

ONTARIO
PARKS



Protected Areas Planning Manual



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Overview and Purpose of the Manual

The Ministry of Natural Resources' (MNR or the ministry) mandate includes the management and protection of Ontario's protected areas system. This system, comprised of more than 620 provincial parks and conservation reserves, contributes to Ontario's economy and the protection of the province's biodiversity. The system also helps to provide opportunities for sustainable outdoor recreation and land uses, natural heritage appreciation, and research. Protected areas range in size, characteristics, diversity and accessibility. They are of environmental, economic and social importance.

Clear and relevant management direction for protected areas is important to delivering on MNR's protected areas mandate. The *Provincial Parks and Conservation Reserves Act*, established the need for management direction that applies to each provincial park and conservation reserve. Management direction in the form of a management statement or management plan provides policy direction for protection, development and management of the significant resources and values of protected areas.

In this manual, "protected areas" refers to provincial parks and conservation reserves. The two are distinguished when there is a particular difference (e.g., only provincial parks are subject to classification).

This *Ontario Protected Areas Planning Manual* (the planning manual or manual) identifies the legal and policy foundation for planning of the province's protected areas. The manual establishes a provincially consistent, transparent and predictable approach to protected areas planning. The planning process is an ongoing cycle of collecting and analyzing information, decision-making, monitoring and evaluating. The manual outlines minimum process and content requirements for preparing management direction. It also identifies application of the *Class Environmental Assessment for Provincial Parks and Conservation Reserves* (2005) and other components outside of the formal planning process that are important in the ongoing management of protected areas. In recognition of Aboriginal or treaty rights and interests, the manual provides guidance on early and ongoing Aboriginal involvement in planning.

The manual places emphasis on early planning or scoping. This includes identifying planning requirements and products, filling information gaps, the early (and ongoing) involvement of Aboriginal people, and consulting with stakeholders and interested public. The planning process relies on using relevant information, which includes ecological, geological and socio-economic data. Aboriginal traditional knowledge and local knowledge shared by stakeholders and the public may also be important to the success of a planning process. It includes a consistent decision-making framework through analysis methods that are clear, repeatable and defensible. It offers flexibility so planning teams can make decisions using the proper extent of effort applied to individual planning projects based on local circumstances.

The planning process takes a holistic approach by blending in other process requirements where practicable. The process also encourages active involvement of planners and managers, considering protected areas in the broader landscape context. It applies principles of adaptive management by providing direction for effectiveness monitoring, clear amendment procedures, and procedures for scheduled examinations of management direction. The process incorporates public interests, and places a priority on measuring effectiveness of direction and amending site level policy where MNR considers it necessary and appropriate. An integrated approach is used to resolve issues and concerns so management decisions will be considerate of provincial priorities and the interests/needs of citizens, while maintaining ecological integrity.

Efforts of many staff across ministry programs assisted in developing this document. Contributions from other government agencies, an Aboriginal focus group, Aboriginal communities and organizations, stakeholders, and interested public also shaped the *Ontario Protected Areas Planning Manual*.

Vue d'ensemble et but du manuel

Le ministère des Richesses naturelles (MRN ou Ministère) a notamment pour mandat la gestion et la préservation du réseau de zones protégées de l'Ontario, qui comprend plus de 620 parcs provinciaux et réserves de conservation et contribue à l'économie de l'Ontario ainsi qu'à la protection de la biodiversité de la province. Le réseau permet aussi de fournir des occasions de pratiquer des loisirs en plein air et d'utiliser des terres de façon écologique, d'apprécier le patrimoine naturel et de faire de la recherche. Si leur étendue, leurs caractéristiques, leur diversité et leur accessibilité varient, les zones protégées ont toutes de l'importance sur le plan environnemental, économique et social.

Il est essentiel, pour la réalisation du mandat du MRN, qu'une orientation claire et pertinente s'applique à la gestion des zones protégées. La *Loi de 2006 sur les parcs provinciaux et les réserves de conservation* a établi la nécessité d'une telle orientation pour chaque parc provincial et chaque réserve de conservation. L'orientation, exposée dans un état ou un plan de gestion, fournit des directives stratégiques pour la protection, le développement et la gestion des ressources et des valeurs importantes que renferment les zones protégées.

Dans ce manuel, on entend par « zones protégées » les parcs provinciaux et les réserves de conservation. Une distinction est faite entre les deux dans le cas d'une différence particulière (par exemple, seuls les parcs provinciaux font l'objet d'une classification).

Le *Manuel de planification des zones protégées* (manuel de planification ou manuel) établit la base juridique et politique de l'aménagement des zones protégées de l'Ontario. Il définit une méthode uniforme, transparente et prévisible pour la planification de ces zones dans toute la province. Le processus de planification est présenté comme un cycle continu de collecte et d'analyse de l'information, de prise de décisions, de surveillance et d'évaluation. Le manuel décrit les exigences minimales auxquelles doit satisfaire l'orientation de la gestion sur le plan du processus et du contenu. Il précise aussi l'utilisation de l'*Évaluation environnementale de portée générale pour les parcs provinciaux et les réserves de conservation* (2005) et d'autres éléments qui ne font pas partie du processus de planification en tant que tel, mais qui sont importants pour la gestion continue des zones protégées. En reconnaissance des droits issus de traités et des intérêts des peuples autochtones, le manuel fournit une orientation visant à favoriser la participation de ces derniers tout au long de la planification, et ce, dès le début du processus.

Le manuel met l'accent sur la planification initiale ou l'établissement de la portée, ce qui implique de prévoir les besoins et les produits, de combler les lacunes en matière d'information, de faire participer les peuples autochtones dès le début et de façon continue par la suite, et de consulter les personnes intéressées et le public. Le processus de planification s'appuie sur l'utilisation d'une information pertinente et de données écologiques, géologiques et socioéconomiques. Les connaissances locales et traditionnelles des peuples autochtones transmises par les différents intervenants et le public sont également vitales pour le succès du processus, de même qu'un cadre décisionnel cohérent qui se fonde sur des méthodes d'analyse claires, pouvant être répétées et justifiées, et l'existence d'une certaine flexibilité pour que les équipes de planification puissent prendre des décisions en fournissant l'effort nécessaire pour chaque projet selon les conditions locales.

Le processus de planification adopte une démarche globale en intégrant si possible d'autres exigences. Il encourage également la participation active des planificateurs et des gestionnaires, en tenant compte des zones protégées dans un contexte paysager élargi. Il applique des principes de gestion adaptative en établissant des lignes directrices portant sur l'efficacité de la surveillance, des procédures de modification claires et des examens réguliers de l'orientation de la gestion. Le processus tient compte des intérêts du public et accorde la priorité à l'évaluation de l'efficacité de l'orientation et à la modification des politiques concernant le site, si une telle mesure est nécessaire et pertinente. Une approche intégrée est utilisée pour résoudre les problèmes et les préoccupations de sorte que les décisions de gestion prennent en considération les priorités provinciales et les intérêts et besoins de la population, tout en maintenant l'intégrité écologique.

L'élaboration de ce document est le fruit des efforts de nombreuses personnes au sein des programmes du Ministère. D'autres organismes du gouvernement, un groupe de discussion autochtone, des communautés et des organismes autochtones, des intervenants et des membres intéressés du public ont aussi contribué à la préparation du *Manuel de planification des zones protégées*.

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1.0 CONTEXT

1.1 History

The scope, scale and overall complexity of planning for Ontario's protected areas have changed over time. Several milestones have led to the approach to planning and management of the protected areas system described in this planning manual:

This chapter presents
the general context in
which MNR undertakes
planning for protected
areas in Ontario.

- 1885 – Niagara Falls Park established as Ontario's first publicly owned park (under the Niagara Parks Commission).
- 1893 – Algonquin provincial park established.
- 1894 – Rondeau provincial park established.
- 1959 – First park policy statement affirmed protection and recreation as key objectives of provincial parks and renewed emphasis on environmental protection.
- 1960s and early 1970s – Policy changes supported management of provincial parks primarily for the purpose of protection.
- 1967 – Introduction of a new policy that divided provincial parks into specific categories, or classes, with compatible sets of uses.
- 1978 – *Ontario Provincial Parks: Planning and Management Policies* (OMNR 1978) established six park classes, four objectives, associated internal zoning and targets for the protection of natural heritage features.
- 1983 – *Provincial Park Management Planning Guidelines* defined what park management plans were and why they were to be prepared.
- 1988 – *Ontario Provincial Park Management Planning Reference* combined and expanded on earlier directions on the role of park management plans and established a process for developing these plans.
- 1992 – Updated *Ontario Provincial Parks: Planning and Management Policies* (OMNR 1992).
- 1994 – The planning reference updated as the *Ontario Provincial Park Management Planning Manual*.
- 1994 – Regulation of the first conservation reserves under the *Public Lands Act*.
- 1997 – The *Conservation Reserves Policy* provided direction for establishing, planning and managing conservation reserves.
- 1999 – *Ontario's Living Legacy Land Use Strategy* made significant changes to protected areas policy within the OLL planning area.
- 2005 – A *Class Environmental Assessment for Provincial Parks and Conservation Reserves* (OMNR 2005a) (Class EA-PPCR) approval in effect.
- 2007 – Proclamation of the *Provincial Parks and Conservation Reserves Act* (OMNR 2006) (PPCRA or the act).
- 2009 – Release of the *Ontario Protected Areas Planning Manual*.

1.2 Legislation

The *Provincial Parks and Conservation Reserves Act* and associated regulations provide the legislative framework for planning and management of Ontario's protected areas. The PPCRA includes objectives for establishing and managing provincial parks and conservation reserves, which centre on protection, sustainable use, education and research. Other legislation, such as the *Endangered Species Act* (ESA), also provides additional direction for protecting Ontario's biodiversity.

Provincial parks objectives:

1. To permanently protect representative ecosystems, biodiversity and provincially significant elements of Ontario's natural and cultural heritage and to manage these areas to ensure that ecological integrity is maintained.
2. To provide opportunities for ecologically sustainable outdoor recreation opportunities and encourage associated economic benefits.
3. To provide opportunities for residents of Ontario and visitors to increase their knowledge and appreciation of Ontario's natural and cultural heritage.
4. To facilitate scientific research and to provide points of reference to support monitoring of ecological change on the broader landscape.

Conservation reserves objectives:

1. To permanently protect representative ecosystems, biodiversity and provincially significant elements of Ontario's natural and cultural heritage and to manage these areas to ensure that ecological integrity is maintained.
2. To provide opportunities for ecologically sustainable land uses, including traditional outdoor heritage activities and associated economic benefits.
3. To facilitate scientific research and to provide points of reference to support monitoring of ecological change on the broader landscape.

The purpose of the PPCRA is:

"To permanently protect a system of provincial parks and conservation reserves that includes ecosystems that are representative of all of Ontario's natural regions, protects provincially significant elements of Ontario's natural and cultural heritage, maintains biodiversity and provides opportunities for compatible, ecologically sustainable recreation".

These objectives recognize the diverse benefits provided by protected areas, such as outdoor recreation; education; quality of life; local to provincial economic impacts; natural and cultural heritage protection; research; providing ecosystem services such as clean water and carbon storage; and many other benefits for the future. The act establishes principles for protected areas. Those principles guide all aspects of the planning and management of Ontario's system of provincial parks and conservation reserves. They affirm that maintenance of ecological integrity shall be the first priority and that MNR shall provide opportunities for external involvement. These principles and objectives are entrenched in the planning process for protected areas outlined in the planning manual.

1.3 Ecological Integrity

Ecological integrity is a complex concept that represents a human notion of the way things should be naturally. The PPCRA establishes the maintenance of ecological integrity as the first priority in planning and management of protected areas. The act defines ecological integrity as follows:

"Ecological integrity refers to a condition in which biotic and abiotic components of ecosystems and the composition and abundance of native species and biological communities are characteristic for their natural regions and rates of change and ecosystem processes are unimpeded."

Direction, approaches and tools for maintaining or restoring ecological integrity:

- Legislation.
- Strategies (e.g., *Ontario Biodiversity Strategy*).
- Policies (e.g., *Provincial Parks Planning and Management Policies*).
- Planning at a landscape scale.
- Tools and guidelines (e.g., *Determining Planning and Management Priorities in Context of Ecological Integrity: A Practical Approach for Planning Teams*).
- Management direction containing site level purpose, vision, values, pressures, objectives, actions, and monitoring.
- Adaptive management approach.
- Science and information.
- Class EA-PPCR.
- Operational approaches.
- Public education.
- Staff training.
- Information management.
- Compatibility test.

In other words, ecosystems have integrity when they have intact native biological components (plants, animals and other organisms), abiotic components (such as geology and water), and processes (such as reproduction population growth). The heart of the definition is in the 'naturalness' of a given protected area. However, the complex and dynamic nature of ecosystems means that putting this concept into practice will be a challenge for planners and managers.

Ecological integrity is not a new concept though it has gained much attention since the mid-1990s. Many principles, approaches and tools that support the maintenance of ecological integrity are already in place. Over time with improving knowledge, experience and the involvement of partners, Aboriginal people, stakeholders and other interested parties, MNR will develop new approaches and tools. Section 2.1.1 identifies the key elements required to establish management direction through planning of protected areas.

MNR addresses ecological integrity at many scales and levels. The processes presented in this manual and the supplementary guidelines enable sound and holistic planning as the basis for maintaining and enhancing ecological integrity, while balancing other objectives related to recreation, education and research.

1.4 MNR Planning Context

The framework in which MNR makes management decisions has several levels, which result in progressively more detailed and specific decisions. Figure 1.1 illustrates the main elements of protected area planning in the context of the provincial planning system. The subject of this manual is concerned with Level 3, Management Direction.

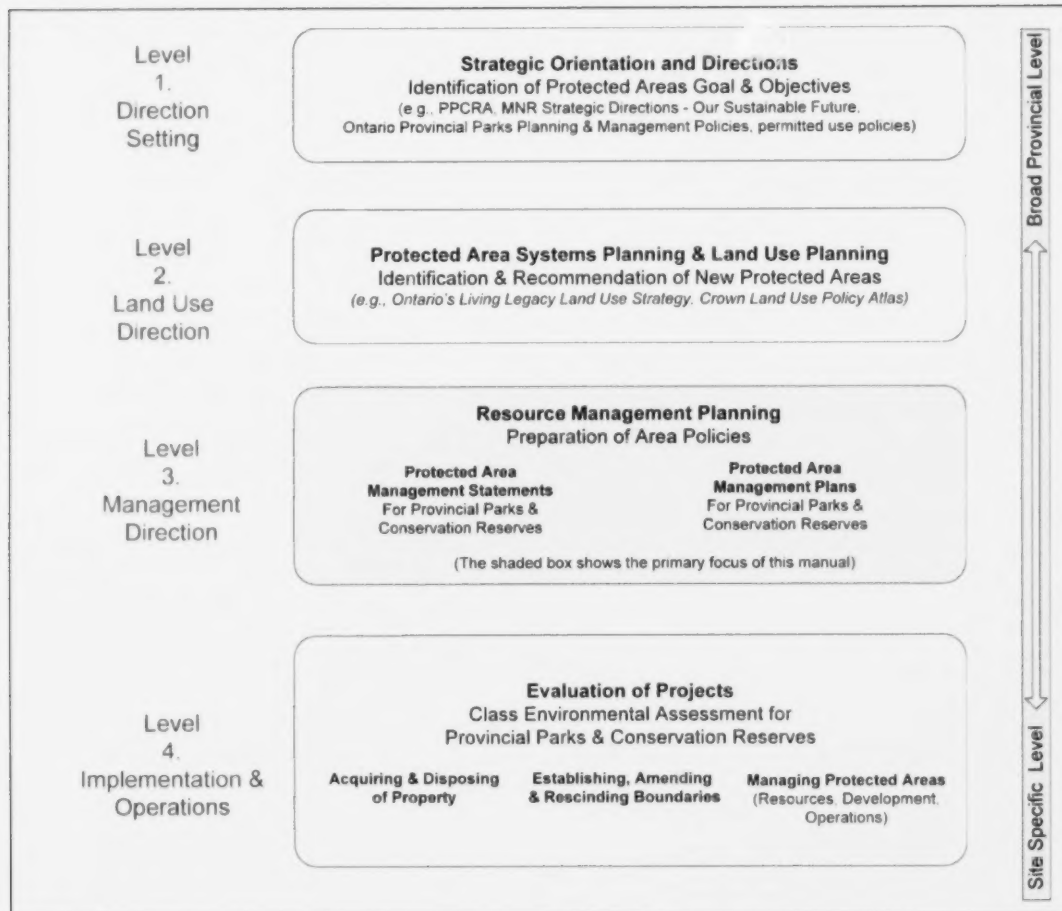
Resource management planning identifies how to manage geographic areas and natural resources (e.g., land, water, wildlife, forests, and protected areas) to achieve the Government of Ontario program targets. Where appropriate, the option of grouping protected areas (provincial parks and/or conservation reserves) may facilitate more efficient and holistic planning.

'Grouping' two or more protected areas (i.e., provincial parks and/or conservation reserves) under a single planning process may result in the production of a single, or multiple management direction documents.

There are two types of protected area management direction, namely, **management statements** and **management plans** (see Chapter 2 for details). The primary role of every protected area management direction is to identify the contribution(s) that a protected area makes to the achievement of the objectives set out in the PPCRA, and to identify management policies aimed at maintaining or enhancing that contribution. The intention is to guide resource management, development and operations of protected areas over time. Written with a 20-year perspective in mind, the examination of approved management direction every 10 years will determine the need for administrative updates, amendments or complete re-write.

When undertaking management direction, there is no "blank slate". Higher-level direction may exist: as discussed previously (e.g., policy or land use directions), which are used to develop specific site level direction. The ministry encourages the coordination of planning processes to establish land use direction (Level 2), resource management direction (Level 3) and environmental assessment project evaluations (Level 4) where it is appropriate and practical to do so.

Figure 1.1 Protected Area Planning in the Context of MNR's Planning System



1.5 Aboriginal Involvement

The manual recognizes Aboriginal communities' involvement in protected area planning is important, as many communities are intrinsically connected to, and share a living relationship with the land. Some communities also have Aboriginal and treaty rights which they may exercise in protected areas. Aboriginal communities may have a considerable amount of information about the values and pressures in protected areas. By discussing this information, and coming to a shared understanding of communities' interests in and uses of protected areas, management decisions may contribute to maintaining ecological integrity and the wellbeing of each Aboriginal community.

Aboriginal communities often have a connection to the land that includes social, cultural, spiritual, economic, ecological and holistic aspects. Protected area planning teams can gain a better understanding of these values by working with Aboriginal communities, where appropriate, to develop involvement processes that are respectful of local knowledge, values and science.

Information and advice contributed by Aboriginal communities can be used to inform many parts of the planning process (Chapter 2). Examples include: values mapping and analysis during the background

information stage; and deliberations on how to manage values when making zoning or policy proposals at the management proposals and preliminary management direction stages. Ongoing discussions and documentation are required throughout the involvement process so the ministry and Aboriginal community can clearly understand the rationale for what input was included or excluded.

Respectful involvement of Aboriginal communities throughout the planning process will further develop working relationships and will provide the foundation for stewardship efforts during implementation, monitoring, resource use and operations.

Some of the key strategies for a planning team to support meaningful Aboriginal involvement include:

- Understanding when and why Aboriginal communities should be involved meaningfully.
- Being aware of each Aboriginal community's relationship with the land and the protected area and respecting that relationship.
- Developing good working relationships prior to initiating management planning projects and continuing to develop relationships and trust during planning.
- Speaking with communities early in the planning process and providing ongoing opportunities for involvement that are as responsive as possible to the communities' needs and preferred ways to participate in the planning process.
- Keeping records of discussions with communities and comments received on management documents, sharing these records with communities for continued clarification.

Early and ongoing discussions of Aboriginal communities' interests in, and uses of protected areas helps both the Ministry and the community determine if potential management decisions could cause adverse impacts on Aboriginal and treaty rights. If it is discovered that Aboriginal or treaty rights may be impacted by a planning decision, the Ministry has a legal duty to consult and, if appropriate, make accommodations so communities can continue to exercise their rights that have been affirmed in the *Constitution Act*.

The Aboriginal Involvement Guideline provides strategies to use at each stage of planning and guidance on how to select appropriate strategies for each situation. Aboriginal involvement can be facilitated through a range of activities such as: meetings, site visits, interactive mapping of areas, joint inventory or public education projects. Involvement will also include opportunities to review and comment on planning documents. Aboriginal communities should be involved in determining the approach that will work best for them based on community priorities and perspectives and in recognition of available resources and the allocation of those resources.

All involvement opportunities available to the public (e.g., Environmental Registry postings, open houses) are also available to Aboriginal communities; however a customized approach to Aboriginal involvement is useful to best meet the unique needs of each Aboriginal community.

1.6 Public and Stakeholder Involvement

Involvement is the process of seeking input from members of the public and stakeholders on issues and values of interest to them. Input from members of the public and stakeholder groups is an important part of planning during information gathering and analysis, as well as decision making phases.

Each protected area planning process must provide the public at least one opportunity to consult during the development of a management statement and at least two opportunities to consult during the development of a management plan. Beyond this, each protected area involvement process is unique and designed to best meet the needs of all interested and affected parties and the general public. While the involvement program may take different formats (e.g., opportunities to view planning documents online, open houses) all processes will provide open and transparent access to information, planning proposals, their impacts and reasoning behind decisions.

Effective involvement strategies provide:

- More and different types of information to shape the background information file than the ministry could gather and analyze on its own.
- Information on how management proposals would affect different groups of people, providing social and economic context for decision making.
- An opportunity to build understanding of and consensus about various management proposals between different groups of people and stakeholders.
- The opportunity to increase awareness about the value of protected areas, empowering citizen stewardship.

Chapter 2 sets out the minimum requirements for involvement during the planning process and the Public and Stakeholder Involvement Guideline provides details on how to choose and facilitate appropriate involvement opportunities to meet the needs of particular planning projects. Guidance is also provided on how to coordinate protected area planning involvement processes with related environmental assessment and or Crown land use amendment involvement processes where MNR considers it appropriate.

Information and advice contributed by the public and stakeholders is considered throughout the planning process. This input may contribute to value and pressure identification, mapping and analysis during the background information stage. This input also provides context to deliberations on how to manage combinations of values when making zoning and other policy proposals at the management proposals and preliminary management direction stages. The ministry documents all discussions with and comments received from public and stakeholders throughout the involvement process and documents what input was incorporated and why (or why not).

Issue resolution can occur at any stage of the planning process. Refer to the Issue Resolution Guideline.

1.7 Application of the Manual

The planning manual will guide MNR staff, partners and consultants in the:

- Preparation of new management direction.
- Administrative updates or amendments to existing direction.
- Examination of existing direction.
- Implementation considerations.

The manual may also be a useful resource for Aboriginal communities, stakeholders and members of the public who have an interest in participating in protected areas planning.

1.7.1 Area of Application

The requirements and policies addressed in the planning manual apply to protected areas that are proposed (e.g., lands acquired for protected area status), recommended or regulated under the PPCRA. This would also apply to proposed or recommended additions to regulated protected areas. These categories could be comprised of Crown lands, parcels acquired by the province, or private property under long-term lease (e.g., lands owned by The Nature Conservancy of Canada).

1.7.2 Supplementary Tools and Guidelines

The manual is a broad policy and procedural document supported by a series of supplementary tools and guidelines (see Chapter 9). These provide technical details, templates, checklists, etc. that focus on how to implement the manual's requirements and minimum standards.

Referenced throughout the planning manual are several tools and guidelines. Chapter 9 also lists these with directions on how planning staff or other interested parties can access them. It is the ministry's

intention to create new, or update/rescind existing tools and guidelines on an as-required basis. For clarification, the tools and guidelines do not form part of the manual. They primarily provide guidance and supplementary information to planning teams.

1.8 Statement of Environmental Values

The Ministry of Natural Resources' *Statement of Environmental Values* (SEV) under the *Environmental Bill of Rights* (EBR) describes how the purposes of the EBR are to be considered whenever decisions are made in the ministry that might significantly affect the environment. This includes decisions made as a result of preparing management direction for a protected area.

The ministry's SEV was considered throughout the process of preparing the *Ontario Protected Areas Planning Manual*. The manual will further the objectives of managing Ontario's resources on an environmentally sustainable basis.

2.0 PLANNING PROCESSES

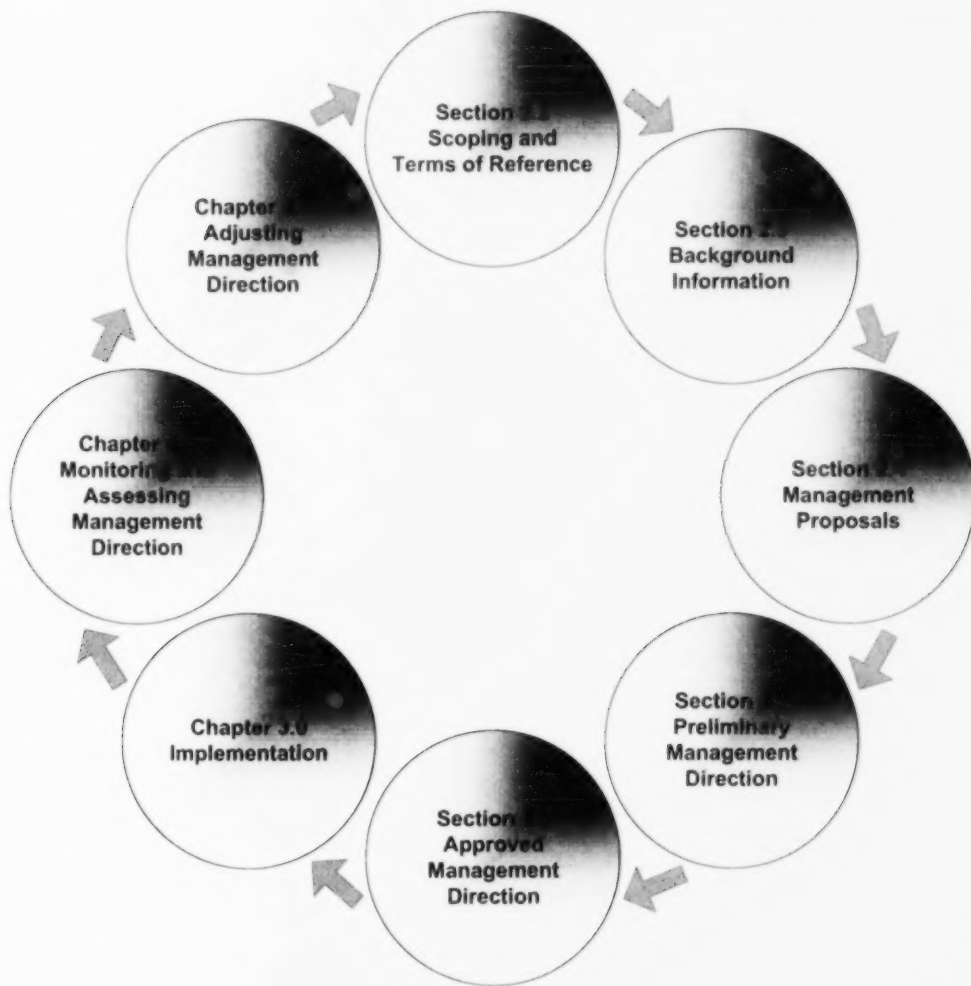
2.1 Introduction

Protected area planning and management occurs as an ongoing cycle. Figure 2.1 portrays the stages of a fully mature planning and management cycle. However, not all protected areas require the same level of planning and management. In some instances, it is possible to isolate or combine elements of the cycle.

This chapter focuses on:

- Determining the scope of a planning process and the appropriate type of management direction.
- Presenting the minimum process and content requirements.

Figure 2.1 Planning and Management Cycle



2.0 PLANNING PROCESSES

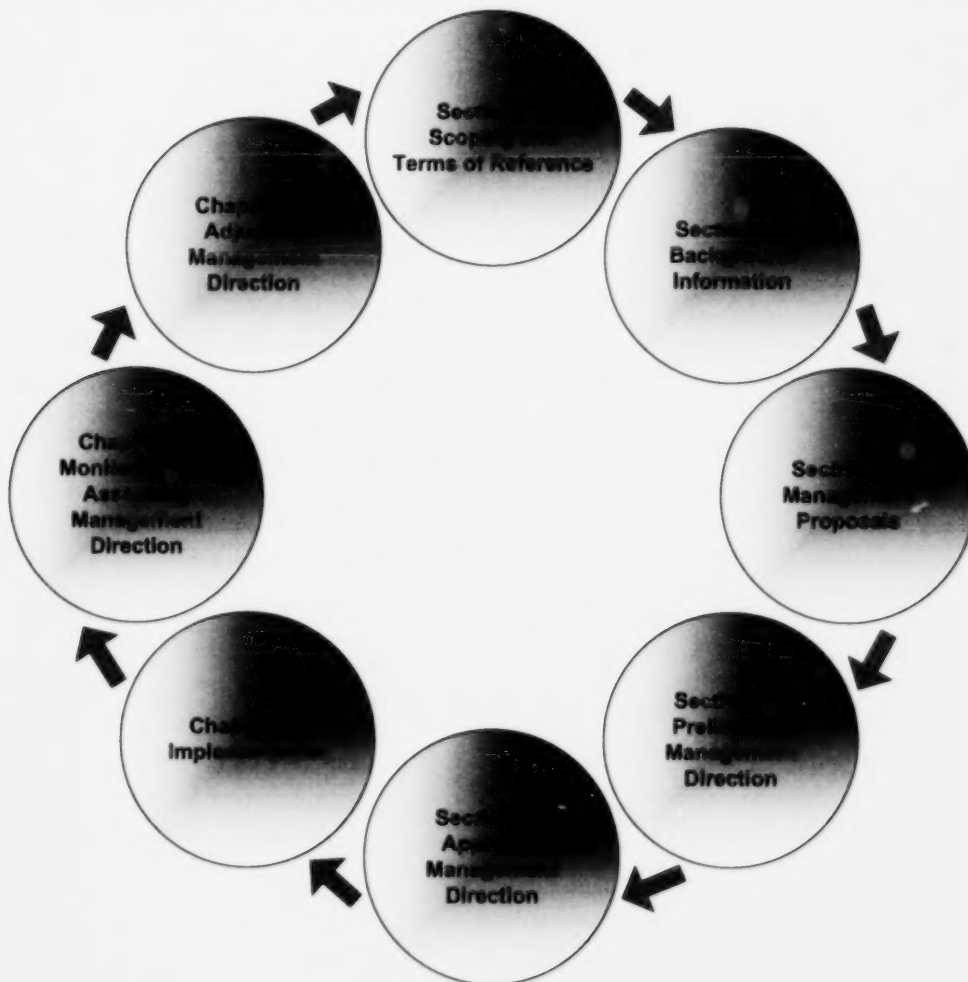
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- Determining the scope of a planning process and the appropriate type of management direction.
- Presenting the minimum process and content requirements.

Figure 2.1 Planning and Management Cycle



The determination of the nature of planning needs is dependant on several factors, which may include:

- The known or potential values (e.g., species at risk, representation of natural and cultural heritage features).
- The current and projected recreational demand in an area.
- The level of complexity of pressures, issues or proposals.
- The level of infrastructure development being contemplated.
- The level of background information to support planning and decisions.
- The level of Aboriginal, public and stakeholder interest.

The planning team considers these factors during the initial scoping step, which includes determining the appropriate type of management direction (i.e., management statement versus management plan) and preparing the terms of reference to guide the project (Section 2.2). Upon approval of the terms of reference, project planning follows each planning stage's process and content requirements for Aboriginal, public and stakeholder involvement. This includes compilation of background information (Section 2.3), management proposals (Section 2.4), preliminary management direction (Section 2.5), and approved management direction (Section 2.6).

2.1.1 Setting Planning and Management Priorities

Formulating the purpose and vision for the protected area(s) early in the planning process helps focus analysis and discussion on the most important values, pressures and activities. Planning links practical actions to clear site-specific objectives, which enable achievement of the vision. Monitoring allows assessment of the effectiveness of planning direction and management actions, and enables an adaptive management approach.

The planning team works to develop site specific, measurable, and achievable site objectives associated with the objectives in the PPCRA. During the scoping and terms of reference (Section 2.2), the planning team needs to develop a purpose statement. Development of the preliminary vision and site objectives would occur as part of the background information (Section 2.3) or the management proposals (Section 2.4). A review of the following informs the preliminary vision and site objectives:

Establishing management direction through planning focuses on addressing these key elements:

- Purpose (the reason for creating the protected area and its role in the system)
- Vision (where we want the protected area to be in 20 years).
- Values and pressures.
- Site objectives and actions to protect and manage values, and abate pressures.
- Monitoring needs to assess implementation of management direction and their effectiveness.
- Adjusting management direction and actions to ensure continuous improvement, when needed.

- Previous purpose and/or vision statements and objectives (from current management direction).
- Early Aboriginal, public and stakeholder involvement.
- Analysis of existing information.

2.1.2 Information Management: The Protected Areas Planning Information Repository

Information is important to protected area planning, which can involve large quantities of diverse information (formats, vintages, sources, precisions, sensitivities, and geographic extents). Planning teams are required to clearly present, openly share, and effectively use information so that all parties involved can make the best use of the information available. Planning teams must manage their information throughout the protected area planning cycle and beyond.

The intensity of information collection and analysis may differ from one planning project to another. Since

the planning process is very dynamic in nature, information will be stored and managed systematically within the MNR Protected Areas Planning Information Repository (PAPIR).

PAPIR is an up-to date information source or archive for a protected area, including its values, and pressures and decisions made. This assists in determining gaps in and currency of the information, and ensuring that it is accessible to MNR planning teams. This helps to identify priorities to apply available resources to further inventory, monitoring and research projects. PAPIR is a 'living' file maintained and updated on an ongoing basis. The planning team initiates PAPIR during scoping and analyzes the information at appropriate intervals during the planning process.

The information repository (PAPIR)

includes information from various program areas such as Land Information Ontario, Natural Heritage Information Centre (NHIC), Natural Resources Values Information System (NRVIS), consultant submissions, etc. PAPIR relies on a user to upload information into the repository.

Access to information collected for protected areas planning, or the protection of privacy of individuals associated with information required for protected areas planning is governed by the *Freedom of Information and Protection of Privacy Act* (FIPPA). MNR shall determine whether information obtained in accordance with the PPCRA can be made available to the public. In making these determinations, MNR shall comply with the FIPPA. MNR will restrict access to certain sensitive information that, if made available, could cause harm or threaten the existence, integrity or health of a natural or cultural resource feature or value (e.g., archaeological sites, species at risk locations).

2.1.3 Summary of Key Planning Steps

The following sections in this chapter outline the planning process that will result with an approved management direction. The requirements in these sections can be related to a series of key steps and their application which can be undertaken during the planning process. Tables 2.1, 2.3, 2.5, 2.6, and 2.7 provide a summary of the key planning steps and their application depending on planning complexity.

While these tables present the steps sequentially that

planning teams will follow, planning processes are often iterative (i.e., there may be a need to return to previous steps when new information becomes available). As well, work on multiple steps often occurs at the same time. Some planning requirements are not easily portrayed in a stepwise form and are not included in these tables even though they are important aspects of the planning process. For example:

- Certain PPCRA requirements (e.g., ecological integrity) must be considered throughout the planning process.
- Ongoing involvement of Aboriginal communities, public and stakeholders which may occur throughout the planning process (in addition to the discrete steps identified).
- Internal reviews and approvals are required throughout the planning process (in addition to the discrete steps identified).

While most of the key planning steps and application listed in the tables are the same regardless of planning complexity, the effort and products required to complete a particular step generally increases as complexity increases. The tables summarize the steps for consideration and indicate supplementary tools and guidelines.

Key Planning Steps and Application:

Table 2.1 – Scoping and Terms of Reference
Table 2.3 – Background Information
Table 2.5 – Management Proposals
Table 2.6 – Preliminary Management Direction
Table 2.7 – Approved Management Direction

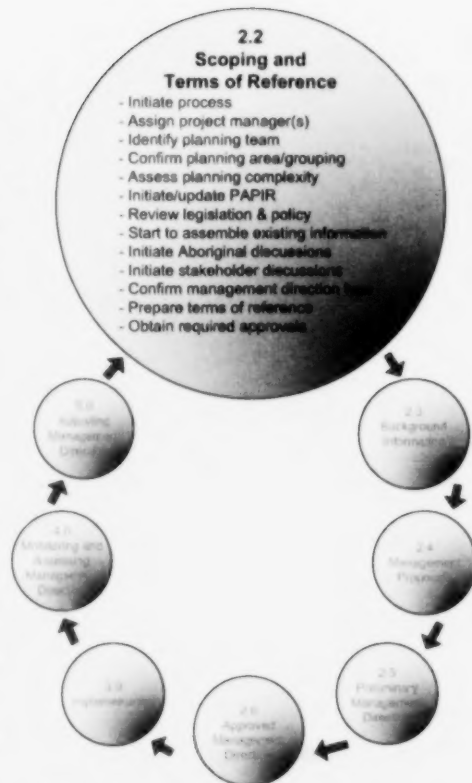
2.2 Scoping and Terms of Reference

The scoping stage in a planning project has multiple elements. This stage includes project scoping, early Aboriginal, public and stakeholder involvement, assembling planning information file and updating the information repository (PAPIR), a decision on the type of management direction, and preparation and approval of the terms of reference. Defining the scope and managing the planning project influences the project's overall success. Each planning project requires staff to engage participants through a careful balance of methodologies, processes, data sources and analysis, tools and other inputs provide that the effort expended on planning is suited to the project's size, complexity, and importance. Refer to Table 2.1 for key planning steps and applications associated with this planning stage.

2.2.1 Project Scoping

Project scoping for each planning project describes boundaries or limits by defining what the project will and will not deliver (i.e., what is "in scope" or "out of scope"). Deliverables are tangible, verifiable outcomes that signify achievement of site objectives. Scoping indicates specific boundaries for a planning area, describes protected area values, planning team membership and lead, an initial assessment of pressures and planning topics, timelines, costs, and other "must have" requirements that provide a framework for the planning project.

When determining scope, only those issues considered by the MNR planning team to be 'major' issues relevant to the protected area need to be identified. It may also be appropriate to identify specific 'key' issues or proposals that will not be addressed during the management planning process. It is not necessary to provide a comprehensive list of what is in scope or out of scope. Project scoping begins several months in advance of the actual approved planning project terms of reference.



Early Aboriginal involvement occurs during the scoping phase of planning so the planning team and community can build a foundation for trust and communication during the rest of the planning process and determine the best options for involvement. Requirements include:

- Identify all Aboriginal communities' interests in the protected area (e.g., those with potentially affected or adjacent traditional territory).
- Review ministry records of claims, assertions and involvement submitted by each Aboriginal community.
- Invite each community to participate, in the manner the community is accustomed to (e.g., in person, with someone who is a member of that community).
- Determine interests, uses and overall values each community has in the planning area.
- Discuss how information will be gathered and shared, and analyzed.
- Discuss how, where and why information and comments will be incorporated (or not).
- Document all communications (or attempted communications) that occur between the ministry and Aboriginal communities.

2.2 Scoping and Terms of Reference

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- Discuss how information will be gathered and shared, and analyzed.
- Discuss how, where and why information and comments will be incorporated (or not).
- Document all communications (or attempted communications) that occur between the ministry and Aboriginal communities.

Early engagement with public and stakeholders occurs during the scoping phase of planning to determine the timelines, resources and strategies necessary so that all interested parties can participate provide information and views towards decision making in protected area planning. Requirements include:

- Review records of involvement and consultations that have occurred in relation to or adjacent to this protected area in the past.
- Assess the need for early discussions with stakeholders to identify priorities and timelines for involvement strategies (necessary in complex projects).

Table 2.1 Scoping and Terms of Reference – Summary of Key Planning Steps and Application

Legend: ✓ = encouraged O = optional blank = not applicable

Key Planning Steps for the Scoping and Terms of Reference Stage	Planning Complexity			Supplementary Tools and Guidelines
	Management Statement (non-complex)	Management Plan (moderately complex)	Management Plan (very complex)	
1. Initiate process based on direction (e.g., five-year protected area planning schedule).	✓	✓	✓	- Five-year Protected Area Planning Schedule Guideline
2. Assign project manager(s).	✓	✓	✓	- Scoping and Terms of Reference Guideline
3. Identify planning team and assign roles (initial).	✓	✓	✓	
4. Confirm the planning area (and grouping of protected areas, if applicable).	✓	✓	✓	
5. Assess planning complexity and make an initial determination of the type of management direction.	✓	✓	✓	- Table 2.2
6. Initiate/update PAPIR.	✓	✓	✓	- Background Information Guideline - Protected Areas Planning Information Repository Guideline
7. Review current legislation and applicable policy.	✓	✓	✓	- Legislation (e.g., PPCRA and ESA) - Policy (e.g., (e.g., Crown land use direction, protected areas policy, and existing management direction)
8. Start to assemble existing information (e.g., preliminary values and pressures mapping, inventories, current issues, social and economic data, etc.), identify gaps, identify critical information needs, and identify issues.	✓	✓	✓	- Background Information Guideline - Determining Planning and Management Priorities in the Context of Ecological Integrity
9. Initiate discussions with Aboriginal communities.	✓	✓	✓	- Aboriginal Involvement Guideline
10. Initiate discussions with stakeholders.	O	✓	✓	- Public and Stakeholder Involvement Guideline
11. Confirm planning complexity and type of management direction.	✓	✓	✓	- Table 2.2
12. Prepare terms of reference (including intent to coordinate processes).	✓	✓	✓	- Scoping and Terms of Reference Guideline - Determining Planning and Management Priorities in the Context of Ecological Integrity - Coordination of Protected Areas Planning Processes Bulletin
13. Obtain required approvals of the terms of reference.	✓	✓	✓	- Protected Areas Directives
(Refer to Table 2.3 to continue the key planning steps and application)				

2.2.2 Type of Management Direction

The *Provincial Parks and Conservation Reserves Act* defines two types of management direction:

A **management statement** is a document approved by the Minister of Natural Resources that provides a policy and resource management framework that addresses a limited number of non-complex issues or proposals, or both, for limited capital infrastructure or resource management projects for one or more provincial parks or conservation reserves or for a combination of them.

A **management plan** is a document approved by the Minister of Natural Resources that provides a policy and resource management framework that addresses substantial and complex issues or proposals, or both, for substantial capital infrastructure or resource management projects for one or more provincial parks or conservation reserves, or for a combination of them.

Table 2.2 provides some considerations to assist in determining which type of management direction is best suited for a project. Practical considerations that may also influence which type of management direction is most appropriate include:

- *Planning scale*: if it will be a stand-alone process for one protected area, or a grouped process for more than one protected area.
- *Maturity*: if it is a new management direction.
- *Amendment*: if administrative update(s) or amendment(s) (including a secondary plan) to an existing management direction is/are needed.
- *Re-write*: if substantial revisions to an existing management direction arise from an examination.
- *Coordination*: if Crown land use amendments or Class EA-PPCR project evaluations are being coordinated with the preparation of the management direction.

Coordination of Processes:

Consideration should be given to whether Class EA-PPCR evaluations or Crown land use amendments will be coordinated with the protected area management planning process. Chapter 3 describes aspects of coordination.

Following the above guidance and practical considerations, a planning project follows one of three possible streams to prepare the management direction (Figure 2.2).

There are no hard and fast rules to determine which type of management direction or stream is the most suitable for a proposed planning project. The "very complex" stream applies when MNR deems it appropriate to consult on management proposals through a separate management proposals document. Enhancement of the minimum requirements for external involvement in the processes (see sidebar) may occur to meet the needs of the particular planning project.

Minimum involvement

requirements from PPCRA are associated with each planning stream:

- Non-complex (one involvement opportunity) – management statement.
- Moderately complex (two involvement opportunities) – moderately complex management plan.
- Very complex (three involvement opportunities) – very complex management plan.

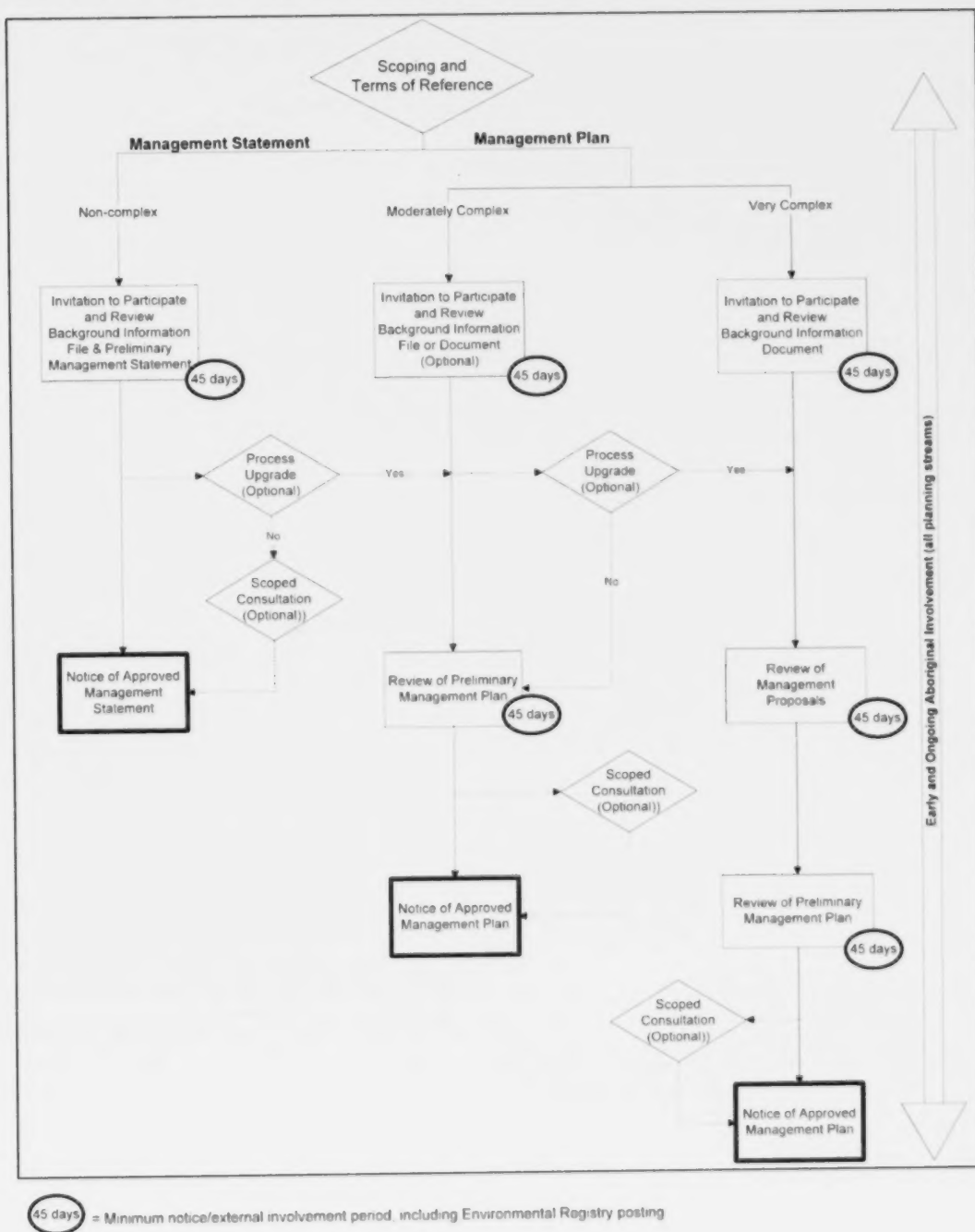
Table 2.2 Considerations to Assist in Determining the Type of Management Direction

Management Statement (non-complex)	Management Plan (moderately complex and very complex)
1. Limited Resource Management ▪ Low potential negative impact on sensitive earth science, life science or cultural values. ▪ Low human or natural pressures. ▪ Low need for active management of natural or cultural values. Status quo or custodial management. 2. Limited Number of Non-complex Issues or Proposals ▪ New decisions, if required, are few and non-complex. ▪ Low potential impact on adjacent landowners. ▪ Low Aboriginal, public and /or stakeholder interest. ▪ Low need for adaptive management. ▪ Non-complex zoning schemes (or no zoning for conservation reserves). 3. Limited New Capital Infrastructure ▪ Minor change in existing infrastructure footprint. ▪ Maintain existing infrastructure and/or formalize existing road(s) to manage uses, but no new roads*. Minimum essential new infrastructure to support existing use and management (e.g., parking, privies). ▪ Routine maintenance; limited change in capacity or design standard, except for safety. ▪ New infrastructure with less than 800m² footprint. ▪ New trails with low potential for impacts.	1. Substantial Resource Management ▪ Moderate to high potential negative impact on sensitive earth science, life science or cultural values. ▪ Moderate to high human or natural pressures. ▪ Moderate to high need for active management of natural or cultural values. 2. Substantial and Complex Issues or Proposals ▪ New decisions are required to deal with complex issues/proposals. ▪ Moderate to high potential impact on adjacent landowners. ▪ Moderate to high Aboriginal, public and /or stakeholder interest (significant - local to provincial). ▪ Moderate to high need for adaptive management. ▪ Moderate to high need for complex zoning schemes. 3. Substantial New Capital Infrastructure ▪ Major change in existing infrastructure footprint. ▪ New infrastructure beyond minimal essential infrastructure. ▪ Proposed infrastructure will substantially increase capacity. ▪ New infrastructure with greater than 800m² footprint. ▪ New trails with moderate to high potential for impacts.

During scoping, project planners do not have to meet all known or discovered attributes listed in the table in order to determine the appropriate type of management direction.

* **Note:** Unless a resource access road is enabled (per PPCRA). Forest access roads may be addressed through Forest Management Planning and enabled in the management statement.

Figure 2.2 Planning Processes, Level of Complexity and External Involvement



2.2.3 Terms of Reference

Terms of reference are prepared as a summary product in the final steps of project scoping to guide the planning team and the responsible MNR district/zone manager to deliver a planning project. The terms of reference reflect:

- The outcome of early Aboriginal, public and stakeholder involvement.
- The use of the information repository (PAPIR).
- The recommendation on the type of management direction.

Terms of reference will be prepared for all projects to develop management statements or plans, and formally approved. Terms of reference for management statements may be less detailed than for management plans.

Terms of reference are intended for planning team guidance only. There is no requirement to publish or externally consult on the terms of reference.

Terms of reference will include the following standard information:

- Planning area (scale, including any grouping of protected areas).
- Planning team.
- Type of management direction.
- Planning context.
- Planning topics (including any risks identified through early involvement).
- Any coordination with other planning initiatives.
- Planning schedule and deliverables (including Aboriginal, public and stakeholder involvement).
- Project resources and costs.

Public and Stakeholder Involvement:

Minimum involvement requirements throughout the planning process include:

- Uploading published planning documents onto MNR website.
- Providing notification (e.g., mailed or e-mailed notices) of released documents to those on the mandatory contact list.
- Posting Environmental Registry policy proposal notice with an invitation to comment (45 days).
- Placing on-site notices (where appropriate).
- Scheduling in-person opportunity for discussion and to share comments (optional for non-complex and moderately complex; normally required for very complex processes).

Aboriginal Involvement:

Work with each Aboriginal community during preparation of the terms of reference and decide what involvement activities to include and when they will occur. Minimum requirements include:

- Proceeding with involvement activities as previously agreed and documented in the terms of reference.
- Ensuring communities receive a copy of any published documents.

A community may choose not to participate in planning or not to respond to requests to discuss the planning project. In this situation, the planning team should consult with the MNR District liaison staff to find suitable means to keep community leaders informed about the timelines and milestones of the planning process.

Planning proceeds following approved terms of reference. Figure 2.2 shows that the planning stages will vary for a given planning project depending on the type of management direction, complexity and Aboriginal, public and stakeholder involvement on products.

When preparing the terms of reference, determine the timelines, resources required and involvement strategies that will be used to best reach Aboriginal communities, the public and stakeholders interested in the planning project. Include the minimum involvement requirements (see box below) at appropriate stages throughout the planning process (see Figure 2.2).

2.3 Background Information

The compilation of background information is an important component of planning. It provides the basis for the analysis of values and pressures, which informs the setting of site-specific objectives, zoning (where applied) and management actions later in the planning process. It will also be useful when evaluating the implementation and overall effectiveness of management direction (Chapter 4) and when considering amendments (including secondary plans) or the examination of management direction (Chapter 5).

In general, information collection about the protected area occurs on an ongoing basis, before, during and after the formal planning project. Compiled information is stored as part of the information repository (PAPIR) and used, as required, during the planning process. The background information step involves several activities, including:

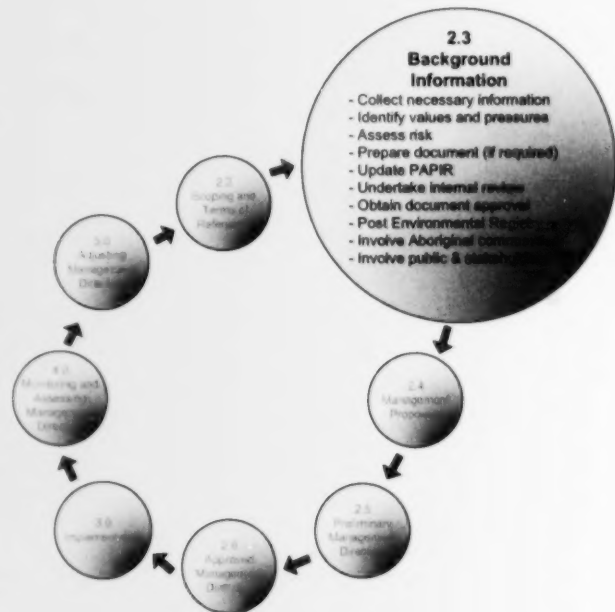
- Acquiring information (vintage or new), that has not yet been obtained.
- Drawing key information out of PAPIR and consolidating the information as required.
- Undertaking analyses of information to support later planning stages.
- Making the consolidated information and analyses available to planning participants.

In general, projects with greater complexity require more thorough background information to support decisions and therefore management statements would require less information and analyses than management plans. In some cases, planning relies on available information and data. Gaps in information needed to support decisions should be noted and identified for later planning stages and where appropriate acquired.

Refer to Table 2.3 for key planning steps and applications associated with this planning stage.

2.3.1 Management Statement Background Information File

A background information file supports the preparation of a management statement. The type of information listed in Table 2.4 should be considered for inclusion in the file, and be available with the preliminary management statement through Aboriginal, public and stakeholder involvement. However, planning teams may share the information with planning participants at any time, especially as a means to identify and fill gaps in information.



Planning proceeds following approved terms of reference. Figure 2.2 shows that the planning stages will vary for a given planning project depending on the type of management direction, complexity and Aboriginal, public and stakeholder involvement on projects.

When preparing the terms of reference, determine the timelines, resources required and involvement strategies that will be used to best reach Aboriginal communities, the public and stakeholders interested in the planning project. Include the minimum involvement requirements (see box below) at appropriate stages throughout the planning process (see Figure 2.2).

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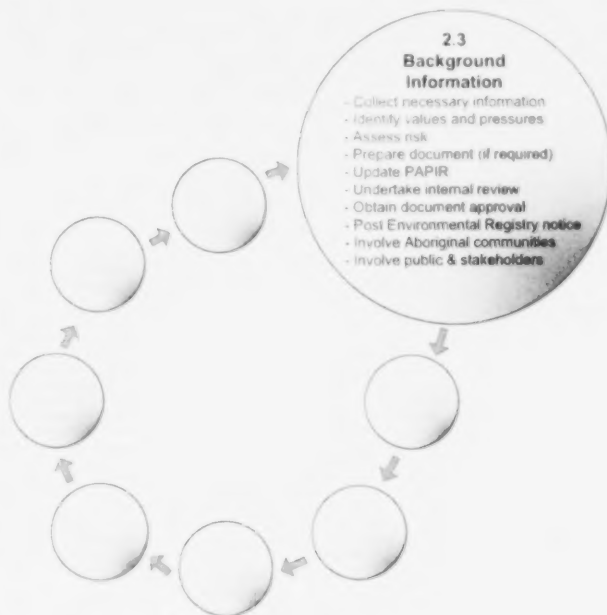
- Acquiring information (vintage or new), that has not yet been obtained.
- Drawing key information out of PAPIR and consolidating the information as required.
- Undertaking analyses of information to support later planning stages.
- Making the consolidated information and analyses available to planning participants.

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2.3.2 Management Plan Background Information File or Document

A thorough review of background information is the initial step in the planning process to prepare a management plan (Figure 2.2). The background information file is normally sufficient to support moderately complex management planning projects. However, the option exists to prepare a document, especially if advancing management proposals at this time.

Table 2.3 Background Information – Summary of Key Planning Steps and Application

Legend: ✓ = encouraged O = optional blank = not applicable

Key Planning Steps for the Background Information Stage (Continued from Table 2.1)	Planning Complexity			Supplementary Tools and Guidelines
	Management Statement (non-complex)	Management Plan (moderately complex)	Management Plan (very complex)	
14. Collect necessary information; assemble/complete background information file.	✓	✓	✓	- Background Information Guideline - Determining Planning and Management Priorities in the Context of Ecological Integrity
15. Identify purpose, values and pressures.	✓	✓	✓	
16. Assess risk.	✓	✓	✓	
17. Prepare background information document (to be published).		O [†]	✓	- Background Information Guideline
18. Update PAPIR as required.	✓	✓	✓	- Protected Areas Planning Information Repository Guideline
19. Complete internal review of background information.	✓	✓	✓	
20. Obtain approval of the background information document. Place approved document on MNR website.			✓	
21. Post Environmental Registry policy proposal notice. Release invitation to participate and review background information.		✓	✓	
22. Involve Aboriginal communities in background information review.	*	✓	✓	- Aboriginal Involvement Guideline
23. Involve public and stakeholders in background information review.	*	✓	✓	- Public and Stakeholder Involvement Guideline
(Refer to Table 2.5 to continue the key planning steps and application)				

[†] This may include management proposals for moderately complex management plans.

* These (thought process considerations) are considered at other steps as described in the text.

A background information document is required for Aboriginal, public and stakeholder involvement in a very complex management planning project. The planning team may release the information with an invitation to participate in planning. However, there is an option to release the background information in the second involvement event in conjunction with the management proposals document. Table 2.4 outlines the type of information considered for a background information file or document, which would include information about the following topics:

- Context and Planning Area (Include a description of the history of planning for the area(s) within the planning project, including where management direction was previously prepared for a protected area (e.g., a 10-year old plan). In such cases, this could include:
 - An assessment of implementation of past management direction.
 - An analysis of the overall effectiveness in achieving previously set protected area objectives and policies.
 - Efforts in adaptive management.
- Natural Heritage Values and Processes.

Refer to Chapter 4
for more discussion
about monitoring
and assessment.

- Cultural Heritage Values (Includes Aboriginal site values).
- Recreational and/or Land Use Values.
- Social and Economic Benefits.
- Protected Area Pressures.
- Summary (Include a synopsis of ecological integrity, current uses and planning challenges).
- Management Proposals (Optional, in association with a moderately complex plan).
- Information Sources (A brief description of available information sources, including their currency and adequacy to support planning).

Table 2.4 Types of Background Information to be Considered

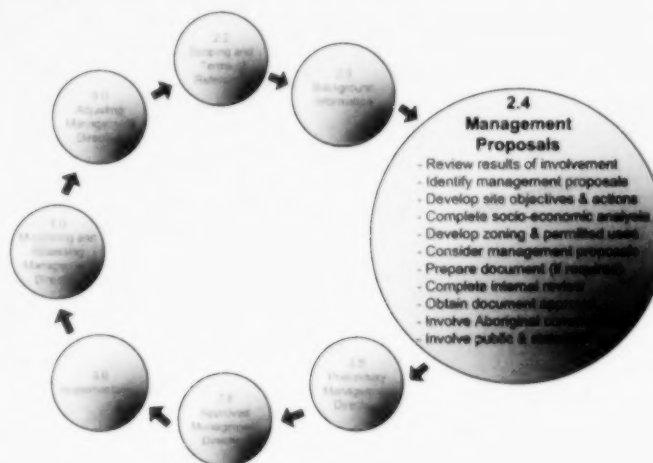
Category	Type of Information
Natural Heritage Values	Protected Area Overview Map
	Identification of Earth and Life Science Values
	Description of Natural Processes Affecting Protected Area Values
Cultural Heritage Values	Description of Aboriginal Site Values Information (specific site information is not to be shared without Aboriginal community consent)
	Description of Historical Values
Recreational/Land Use Values	Recreational/Land Use Values Map
	Description of Ecologically Sustainable Recreational/Land Use Values
Social and Economic Benefits	Description of Direct-use, Indirect-use, and Non-use Values
	Social and Economic Documentation
Protected Area Pressures	Pressures on Values Mapping Analysis Outputs
Protected Area Policy	Protected Area Zoning Map (if already exists)
	Past Management Direction (if already exists)
	Documentation of Planning History

As a result of Aboriginal, public and stakeholder involvement during this initial stage, the planning of moderately complex situations may become more complex. Accordingly, it may be appropriate to upgrade to a very complex process, as illustrated in Figure 2.2. Alternatively, optional scoped involvement following the release of the preliminary management direction may be considered.

2.4 Management Proposals

A planning team may consider management proposals in any planning project. This often includes proposing alternative approaches to manage protected area resources, infrastructure and operations and thus to get feedback on alternatives.

There is no management proposals document in either a non-complex or a moderately complex planning project. As such, a planning team may present proposals in the preliminary management statement. In moderately complex planning situations, there



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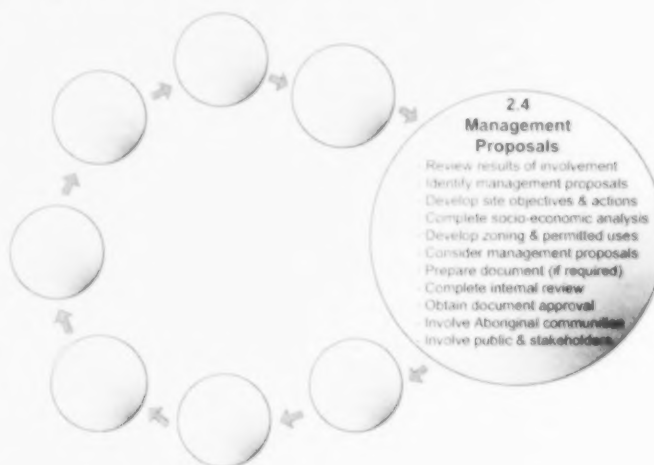
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may be only a few substantial issues or management proposals. In such cases, this analysis can occur as part of a background information document, where the planning team puts forward proposals.

In very complex planning projects, the production of a separate management proposals document would occur as an intermediary step before Aboriginal, public and stakeholder involvement on the preliminary management plan.

Refer to Table 2.5 for key planning steps and applications associated with this planning stage.

A planning team may apply a compatibility test for conservation reserves and provincial parks during planning to assess the appropriateness of uses. Proposed activities need to be considered to determine their potential impact relative to a protected area's vision and objectives, and conformity to existing policy and management direction, including consideration of ecological integrity. Potential impacts of proposed activities on the protected area values are based on several factors such as, significance and sensitivity of the values to human use, impact on current uses, costs, supply of alternative opportunities, impact on accessibility and any impact on other socio-economic considerations.

Table 2.5 Management Proposals – Summary of Key Planning Steps and Application

Legend: ✓ = encouraged O = optional blank = not applicable

Key Planning Steps for the Management Proposals Stage (Continued from Table 2.3)	Planning Complexity			Supplementary Tools and Guidelines
	Management Statement (non-complex)	Management Plan (moderately complex)	Management Plan (very complex)	
24. Summarize/review results of involvement, consider as appropriate (e.g., update PAPIR).		✓	✓	- Protected Areas Planning Information Repository Guideline
25. Identify and analyze management proposals.		O	✓	- Management Proposals Guideline
26. Develop site vision, objectives and actions (initial).	*	*	✓	- Determining Planning and Management Priorities in the Context of Ecological Integrity
27. Complete social and economic analysis.	*	*	✓	
28. Develop proposed zoning/permitted uses (optional for conservation reserves) and apply compatibility test as appropriate.	*	*	✓	- Protected Areas Zoning Guideline - Protected Areas Compatibility Test
29. Prepare management proposals document.			✓	- Management Proposals Guideline
30. Update PAPIR as required.			✓	- Protected Areas Planning Information Repository Guideline
31. Complete internal review of document.			✓	
32. Obtain approval of the document. Place approved document on MNR website.			✓	
33. Post Environmental Registry policy proposal notice.			✓	
34. Involve Aboriginal communities in document review.	*		✓	- Aboriginal Involvement Guideline
35. Involve public and stakeholder in document review.	*		✓	- Public and Stakeholder Involvement Guideline
(Refer to Table 2.6 to continue the key planning steps and application)				

* The results of these thought processes are presented at other steps as described in the text.

Experience shows that there may be substantial feedback in a planning project after the release of background information. Such response may lead to more information on use and management. As a result, proposals may begin to emerge as the planning team gains a greater appreciation of the protected area and others' perspectives.

In developing management proposals, the planning team does not begin with a blank slate. As a result of strategic and Crown land use planning, matters such as protected area designation (i.e., provincial park or conservation reserve) or provincial park classification are often pre-determined. In some cases, protected area designation or park classification may be re-evaluated based on new information.

A planning team must frame management proposals within the legislation and governing policies for a conservation reserve and provincial park. Information from resource inventories and issues associated with the protected area all provide information that may lead to viable proposals. A planning team develops management proposals in order to accomplish the following:

Management proposals, in this context, refers only to the management options that a planning team brings forward for further consideration during the planning process.

- Identify and provide different approaches to protection or management for a protected area's natural or cultural values.
- Delineate zones that require management that is different from that of adjacent zones - see zoning section in this manual (Section 2.4.1).
- Demonstrate variations in balancing a protected area's objectives relative to the provincial protected areas system objectives.

The identification of a preferred management proposal may be possible and appropriate though it is not mandatory. It may be desirable not to present a preferred alternative and instead wait for input to inform a recommended approach. This consideration may be more important in very complex planning projects. The final involvement opportunity in a planning project, the release of a preliminary management plan, is the ministry's statement of preferred management proposals.

2.4.1 Zoning

Zoning is a tool used to describe specific geographies, policies and management priorities within a protected area. It can provide a standard approach to support management objectives and actions, based on a variety of values, to address existing or expected patterns of access and use.

Zoning is particularly useful where managers face a number of discrete values to protect and/or extensive public use. Nested under one zone with common management direction are a number of values and uses with common management needs. Managers can readily evaluate potential pressures on the area's values.

In addition to being a planning tool, zoning provides visitors and users with a quick visual appreciation and policy direction on how to manage a particular protected area. Zoning can help encourage the public's understanding and appreciation of each protected area's contribution.

The PPCRA provides for the creation of zones within provincial parks and conservation reserves as part of the development of management direction. Historically in Ontario, zoning has been a requirement for provincial parks for several decades. The *Ontario Provincial Parks Planning and Management Policies* (OMNR 1992) presents zoning applications. Under the direction of these policies, zoning is required for provincial parks.

Zoning conservation reserves is not a mandatory requirement. Non-complex management statements and moderately complex management plans for conservation reserves may use zoning, as appropriate for the circumstance, while very complex management plans should consider using zoning to address substantial or complex issues or proposals. Refer to the guideline, *A Framework for Zoning Conservation Reserves*.

In any planning project that uses zoning, planners should address the appropriate site objectives and management focus through the designation of zones. This will provide staff and the public with both a

measure of the recognition for the zone, its policies, and any associated values within the area.

2.5 Preliminary Management Direction

This section describes the content and documentation requirements for preliminary management statements and plans (Figure 2.2). This is the important stage in planning when the ministry's program for protecting and managing the key protected area values and addressing pressures are presented in the context of site level objectives, actions and monitoring. Refer to Table 2.6 for key planning steps and applications associated with this planning stage.

In general, preliminary management direction includes:

- a) A description of the protected area's designation as a provincial park (and its classification) or conservation reserve, and its role and significance in the context of the provincial protected areas system (e.g., addressing relevant PPCRA objectives).
- b) A statement of policy, including zoning (optional for conservation reserves), and addressing the protection, planning, development and management of the significant resources and values.
- c) An explanation of how planning and management activities contribute to the protected area's purpose, vision and site objectives, achievement of ecological integrity, environmental protection and sustainability, and how decisions are responsive to Aboriginal, public or stakeholder interests.
- d) An explanation of how planning and management activities contribute to the protected area's purpose, vision and site objectives. This includes consideration of how MNR decisions are responsive to Aboriginal, public or stakeholder interests.
- e) A rationale and priorities for resource management and capital development that are evaluated through the Class EA-PPCR.
- f) A summary of internal and external involvement, including how the planning team addressed issues through the planning process.
- g) A basis for monitoring and assessing the resource management, development and operations activities.



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- c) An explanation of how planning and management activities contribute to the protected area's purpose, vision and site objectives, achievement of ecological integrity, environmental protection and sustainability, and how decisions are responsive to Aboriginal, public or stakeholder interests.
- d) An explanation of how planning and management activities contribute to the protected area's purpose, vision and site objectives. This includes consideration of how MNR decisions are responsive to Aboriginal, public or stakeholder interests.
- e) A rationale and priorities for resource management and capital development that are evaluated through the Class EA-PPCR.
- f) A summary of internal and external involvement, including how the planning team addressed issues through the planning process.
- g) A basis for monitoring and assessing the resource management, development and operations activities.



Table 2.6 Preliminary Management Direction – Summary of Key Planning Steps and Application

Legend: ✓ = encouraged ○ = optional blank = not applicable

Key Planning Steps for the Preliminary Management Direction Stage (Continued from Table 2.5)	Planning Complexity			Supplementary Tools and Guidelines
	Management Statement (non-complex)	Management Plan (moderately complex)	Management Plan (very complex)	
36. Summarize/review results of involvement, consider as appropriate (e.g., update PAPIR).			✓	- Background Information Guideline - Protected Areas Planning Information Repository Guideline
37. Prepare preliminary management direction document.	✓	✓	✓	- Management Direction Template - Determining Planning and Management Priorities in the Context of Ecological Integrity - Coordination of Protected Areas Planning Processes Bulletin
38. Complete internal review of preliminary management direction document.	✓	✓	✓	
39. Obtain approval of the preliminary management direction document. Place approved document on MNR website.	✓	✓	✓	
40. Post Environmental Registry policy proposal notice.	✓	✓	✓	
41. Involve Aboriginal communities in preliminary management direction review.	✓ ‡	✓ ‡	✓	- Aboriginal Involvement Guideline
42. Involve public and stakeholders in preliminary management direction review.	✓ ‡	✓ ‡	✓	- Public and Stakeholder Involvement Guideline
(Refer to Table 2.7 to continue the key planning steps and application)				

‡ Also includes opportunity to review background information.

2.5.1 Preliminary Management Statement

Management statements are prepared for protected areas with limited complexity (Table 2.2). In such cases, there is one opportunity for involvement with the bringing together of the background information file and preliminary management statement (Figure 2.2). These products are the subject of the invitation to participate.

A preliminary management statement contains the ministry's preferred policies and direction for the management of the protected area(s) and implementation priorities. The statement sets direction and identifies projects that may require further evaluation through the application of the Class EA-PPCR (Section 3.3). The preliminary management statement policies and actions address the following topics:

- Introduction (name, location, classification, etc.).
- Protected areas legislation and objectives.
- Protected area values and pressures.
- Purpose, vision and site objectives for the protected area.
- Zoning (as appropriate).
- Permitted uses.
- Resource management activities.
- Operations activities.
- Development activities.
- Implementation priorities.
- Monitoring activities.

After involvement for this stage ends (as described in the terms of reference), involvement for the planning project is normally complete. However, in some cases new proposals, issues or the need to

resolve concerns may have arisen. It may be appropriate to undertake further optional scoped involvement as illustrated in Figure 2.2. This may occur by upgrading the process to a moderately complex management plan, or alternatively, by undertaking further involvement to enhance input on the preliminary management statement. The further involvement may involve all known planning participants or it may be scoped to those known to have a particular interest in, or potentially affected by an aspect of the preliminary management statement. The responsible MNR district/zone manager will make this determination. All input is considered and the planning team incorporates relevant comments into the revised management statement as the responsible manager considers appropriate.

2.5.2 Preliminary Management Plan

This section describes the planning processes to develop a preliminary management plan. It refers to the content and documentation requirements, and the Aboriginal, public and stakeholder involvement requirements.

Preparing the direction in the preliminary management plan considers the comments from previous Aboriginal, public and stakeholder involvement, from the background information and management proposals as applicable.

The process consists of a minimum of two opportunities for involvement for a moderately complex plan and three opportunities for involvement for a very complex planning process (Figure 2.2).

The preliminary management plan contains all policies and direction for the management of a protected area(s). In addition, it outlines implementation priorities for the plan's elements and summarizes any involvement that has occurred. The plan sets direction and identifies projects that may require further evaluation through the application of the Class EA-PPCR (see sidebar). In all cases, the preliminary management plan will stand as the ministry's preferred policy for the protected area. The planning team will make the document available for Aboriginal, public and stakeholder review.

The preliminary management plan contains the protected area's policies and actions under each of the following areas:

- Introduction (name, location, classification, etc.).
- Protected areas legislation and objectives.
- Protected area values and pressures.
- Purpose, vision and site objectives for the protected area.
- Zoning (as appropriate).
- Permitted uses.
- Resource management activities.
- Operations activities.
- Development activities.
- Implementation priorities.
- Monitoring activities.

After the review period closes, Aboriginal, public and stakeholder involvement for the planning project is normally complete. However, in some cases new proposals, issues or resolution of concerns may have arisen. It may be appropriate to undertake further optional involvement. The further involvement may involve all known planning participants or be scoped to those who are known to have a particular interest in, or be affected by a proposed change. The responsible MNR district/zone manager will make this determination. All input is considered and relevant comments incorporated into the revised management plan, as the responsible manager considers appropriate.

2.6 Approved Management Direction

Following Aboriginal, public and stakeholder involvement on the preliminary management statement or plan, the document undergoes revision to create the approved management direction:

- Consider comments from Aboriginal, public and stakeholder response to the preliminary management statement or plan and incorporate changes on a case-by-case basis as necessary and appropriate.
- Make wording changes to identify this document as the approved management statement or plan (revised from preliminary management direction).
- Provide or update the summary of Aboriginal, public and stakeholder involvement section.
- Address significant issues considered in the preliminary management statement or plan.

Refer to Table 2.7 for key planning steps and applications associated with this planning stage.

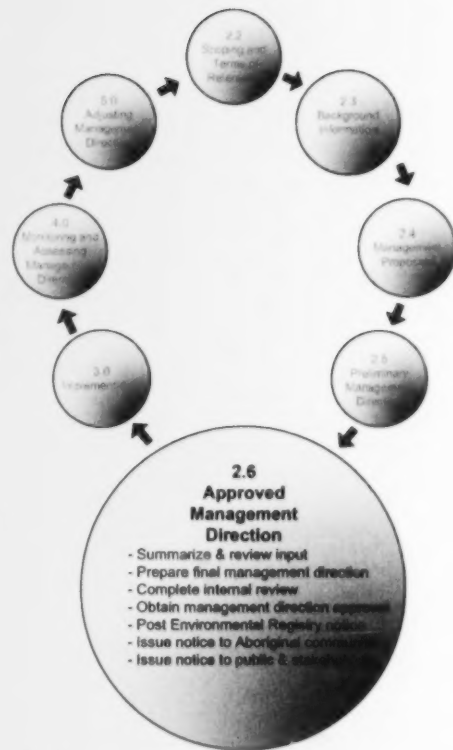
The content and structure of the revised management statement or plan are essentially the same as the respective preliminary management statement or plan, covered in the preceding sections. Following revisions, the planning team recommends the document for approval.

Upon approval of a management statement or plan, the planning team:

- Updates the information repository (PAPIR) to include:
 - Approved management direction.
 - Summary of Aboriginal, public and stakeholder involvement.
 - Environmental Registry policy decision notice and supporting files.
 - Consideration of MNR's *Statement of Environmental Values*.
- Produces the final document and issues a notice of approval.

In addition, MNR will:

- Retain copies of completed planning file information and approved management direction at the protected area (where offices exists), and at the relevant district or zone office.
- Retain copies of approved management direction at the Planning and Research Section, Ontario Parks.
- Provide copies of approved management direction and published documents related to current planning projects on the MNR website.



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Following Aboriginal, public and stakeholder involvement on the preliminary management statement or plan, the document undergoes revision to create the approved management direction:

- Consider comments from Aboriginal, public and stakeholder response to the preliminary management statement or plan and incorporate changes on a case-by-case basis as necessary and appropriate.
- Make wording changes to identify this document as the approved management statement or plan (revised from preliminary management direction).
- Provide or update the summary of Aboriginal, public and stakeholder involvement section.
- Address significant issues considered in the preliminary management statement or plan.

Refer to Table 2.7 for key planning steps and applications associated with this planning stage.

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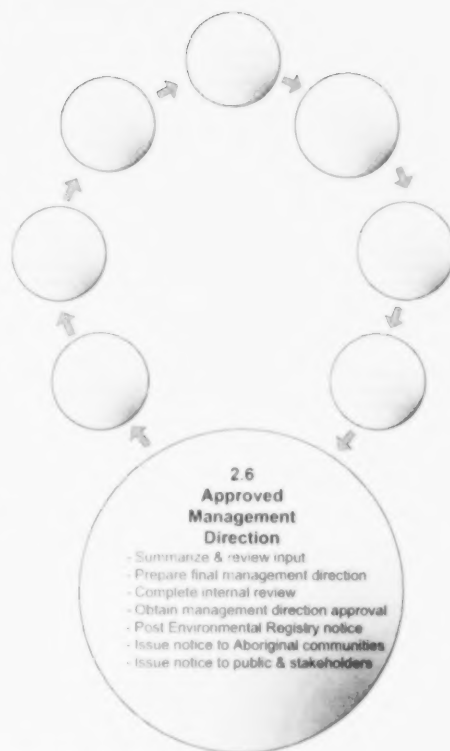


Table 2.7 Approved Management Direction – Summary of Key Planning Steps and Application

Legend: ✓ = encouraged O = optional blank = not applicable

Key Planning Steps for the Approved Management Direction Stage (Continued from Table 2.6)	Planning Complexity			Supplementary Tools and Guidelines
	Management Statement (non-complex)	Management Plan (moderately complex)	Management Plan (very complex)	
43. Summarize/review results of involvement activities and consider as appropriate (e.g., update PAPIR).	✓	✓	✓	- Background Information Guideline - Protected Areas Planning Information Repository Guideline
44. Prepare final management direction.	✓	✓	✓	- Management Direction Template
45. Complete internal review of the document.	✓	✓	✓	
46. Obtain approval of the document. Place approved document on MNR website.	✓	✓	✓	
47. Post Environmental Registry policy decision notice.	✓	✓	✓	
47. Issue notice of approval to Aboriginal communities.	✓	✓	✓	- Aboriginal Involvement Guideline
48. Issue notice of approval to public and stakeholders.	✓	✓	✓	- Public and Stakeholder Involvement Guideline

A secondary plan may be prepared in a limited number of cases, generally for complex topics where management direction policy is required or needs elaboration. Secondary plans would be treated as amendments to existing management direction. Possible examples include fire management plans and ecosystem management plans. Refer to Section 5.1.2 for further direction.

3.0 IMPLEMENTATION

Upon completion and approval of the management direction, the important task of implementing that direction begins. Three components need consideration, as follows:

- *Post-release of the management direction:* This includes communicating the status of the document; defining roles, responsibilities and timelines; updating databases; using the information for annual work planning (budgeting); etc.
- *Application of adaptive management approach:* This involves continual improvement of management policies and practices by learning from the outcomes of their application.
- *Application of Class EA-PPCR:* This entails an initial check of all projects to determine any further anticipated requirements for evaluation of effects prior to implementation and the need for mitigation techniques.

This chapter focuses on:

- Main roles and actions to implement management direction.
- Applying the adaptive management approach to all levels of the planning system.
- Implementing projects through the Class EA-PPCR.

3.1 Communications and Information Management

After the management direction approval and release, the policies, prescriptions, and information contained in the document is applied. Recommended tasks are as follows.

MNR planners and other staff should:

- Further to any MNR press releases, inform managers, partners and the public regarding the importance of the approved management direction, its interpretation and implementation.
- Update local, zone and regional databases with information from the approved management direction.
- Populate the respective provincial databases with the updated information (e.g., @PAR, NHIC, NRVIS, ODMS, CLUPA, etc.).
- Update the information repository (PAPIR).
- Formulate proposals for annual work plans in support of future amendments (including secondary plans), examinations or re-writes of management direction.

MNR managers at the appropriate level should:

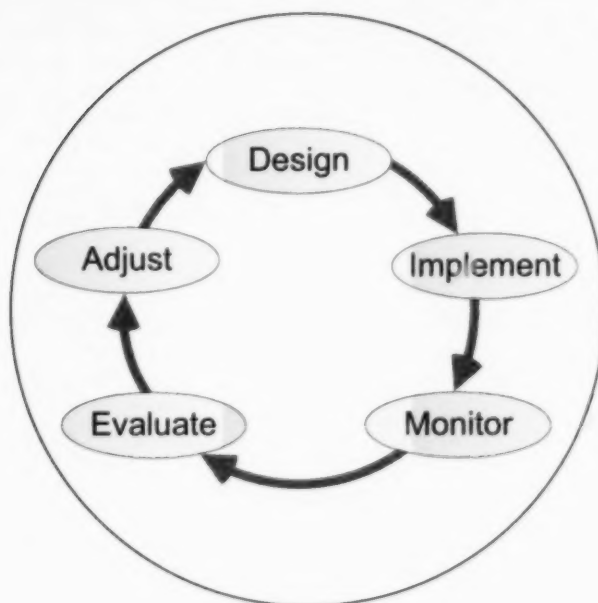
- Refer to management direction before implementing new projects or activities to confirm that the appropriate approvals are secured and in place, or it is otherwise permitted (e.g., provincial policy).
- Check the Class EA-PPCR status of projects prior to implementation.
- Examine management direction periodically to assess whether administrative updates or amendments (including secondary plans) are required to deal with new or changing priorities, proposed uses or activities.
- Establish implementation priorities.
- Consult the approved management direction during the preparation of annual work plans (i.e., budgeting).
- Monitor the effectiveness of management actions and maintenance of ecological integrity and make adjustments/adaptations accordingly.

3.2 Application of Adaptive Management Approach

Ecosystems are complex and dynamic and our ability to predict how they will respond to management actions and human use is often limited. However, despite these uncertainties management decisions (to either take action or not) must be implemented. Adaptive management provides managers with an approach to proceed responsibly in the face of such uncertainty. Adaptive management can be visualized as a five-step cycle (Figure 3.1) and implement it can be implemented at all levels of the planning system.

Adaptive management approaches may be considered and applied during the implementation of projects. These may range from rather simple and straightforward projects through to very complex projects (e.g., ecosystem management). MNR staff will find it advisable to work with ecologists and other specialists to design adaptive management approaches in the more complex cases.

Figure 3.1 Adaptive Management Approach



Adaptive Management:

MNR's strategic direction, *Our Sustainable Future* (OMNR 2005b), establishes adaptive management as an operating principle:

"The planning for and management of natural resources should strive for continuous improvements and effectiveness through adaptive management of natural resources."

3.3 Application of the Class Environmental Assessment

A *Class Environmental Assessment for Provincial Parks and Conservation Reserves* (OMNR 2005a) requires staff to consider carefully protected area values, including minimizing potential negative effects on natural, social, economic and cultural features, deciding whether and how to implement most projects.

Application of the Class EA-PPCR is a legal requirement (see sidebar) under the *Environmental Assessment Act*. Prior to implementation, the project manager must confirm the completion of Class EA-PPCR requirements (see Level 4 in Figure 1.1).

For clarity, this manual presents a general summary of the Class EA-PPCR. The legal requirements are presented in the Class EA-PPCR document.

For most of the routine or operational aspects of protected areas' work, there are no (or only low)

potential negative effects associated with the work. In addition, the approaches to implementing the work often include applying simple techniques to minimize potential negative effects. Therefore, there is no need to carry out further evaluation for most aspects of routine work. The Class EA-PPCR refers to these as Category A projects.

In other cases, projects may have potential for negative effects that require evaluation and mitigation to minimize or offset the negative effects prior to implementation. These types of projects are 'screened' using the procedure in the Class EA-PPCR to assign them to one of the following: Category B (low to medium net negative effects, medium concern); Category C (medium to high net negative effects, high concern); or Category D (high net negative effects or concern). MNR does not anticipate proposing to proceed with projects that may have high net negative effects and, therefore, MNR anticipates that in only a very limited number of cases, a Category D project might be considered.

Category B and C evaluations entail preparing a 'project evaluation' or an 'environmental study report', respectively, following the rules set forth in the Class EA-PPCR. This includes opportunities for Aboriginal, public and stakeholder involvement. A Category D evaluation would result in the preparation of an individual EA, a planning process with its own specific content and process guidelines.

From an adaptive management perspective, it is important to consider the monitoring, evaluation and reporting component of evaluations. This enables staff to assess whether predictions of net environmental effects were valid, and to confirm the effectiveness of implementation and mitigation measures. This is the 'feedback loop' that informs the adaptive management approach. As such, consideration of monitoring is a requirement (see Chapter 4).

3.3.1 Coordination of Processes

Category B and C Class EA project evaluations and consultation processes may be coordinated with one or more planning processes, such as:

- Development of management direction for a provincial park or conservation reserve.
- Amendments to management direction (including secondary plans).
- Crown land use plans or amendments.
- Other environmental assessment mechanisms.

The planning team for the management direction will have to weigh the potential benefits of coordinating processes (e.g., one process for the public, shorter timelines, lower process costs, quick response, need for approval in the short term to meet priority government objectives) against potential disadvantages (e.g., increases in content or process complexity). Processes that will be clear and easy for the public to understand should be used.

The Class EA-PPCR requirements may be coordinated with the preparation of the management direction in different ways. For example, Aboriginal, public and stakeholder involvement requirements can be undertaken concurrently, while the planning team could address documentation requirements for a Class EA-PPCR evaluation in the text of the management direction, or presented separately. The team makes this determination dependant upon a consideration of local circumstances and needs.

The Coordination of Protected Areas Planning Processes Bulletin outlines optional approaches for coordinating processes.

Two key principles should be considered when coordinating processes. Firstly, planning material (e.g., notices, advertisements, etc.) must state if coordination of processes is occurring. Secondly, the content and involvement requirements of the processes being coordinated must be met.

4.0 MONITORING AND ASSESSING MANAGEMENT DIRECTION

Monitoring allows MNR to determine the achievement of the vision, site objectives, and actions outlined in the management direction for the protected area or group of protected areas. This is an important component of assessing the effectiveness of management direction on an ongoing basis and at the 10-year examination of the management direction. This supports the application of adaptive management.

Monitoring supports the assessment of the effectiveness of management direction in two ways:

- To evaluate implementation of the management direction.
- To determine the effectiveness of management actions.

The vision, site objectives and actions guide the priorities for monitoring for a protected area. It is through monitoring that it can be determined if the vision, site objectives and actions were actually achieved. The protected area as a whole and the various values associated with representation and legal obligations (e.g., species at risk) are a primary focus. Monitoring can also help us to learn and adapt, thereby improving our ability to manage protected areas successfully.

This chapter focuses on the elements of monitoring to assess the effectiveness of management direction:

- Did we do what we said we would do?
- Was it effective?
- What condition is the value in?
- How do we establish monitoring priorities?

4.1 Implementation of Management Direction

Monitoring implementation determines if the direction given in the management statement or plan was carried out, answering the question, "**Did we do what we said we would do?**" This type of monitoring is essentially an audit of performance in following through on management direction and could be applied to all actions and policies associated with the management direction. This is an important aspect of the examination of management direction because it shows the degree of management direction implementation. The examination assesses whether the remaining actions are still relevant and sufficient to guide implementation, or if there is a need for a re-write to establish new direction and actions.

Determining whether actions or policies were successful in achieving what they were intended to achieve (effectiveness) is the focus of the Section 4.2.

4.2 Effectiveness of Management Actions

Based on the direction provided by the vision, site objectives and actions, monitoring can occur to support the assessment of specific management actions. This includes monitoring the activities intended to mitigate undesirable impacts on protected area values or for restoration. This approach answers the question "**Was it effective?**" Through monitoring, managers are able to learn, share information about success or failures and adapt as necessary and as resources are available. This is the essence of an adaptive management approach.

Monitoring carried out in association with Class EA-PPCR projects could be used as part of the effectiveness evaluation of the management direction.

4.2.1 Maintaining Ecological Integrity

MNR staff need to consider the various pressures and their impacts (including management decisions and associated actions) on the protected area as a whole and on the condition of specific values.

Monitoring provides a means to establish the initial or baseline condition of specific values within protected areas and change in the condition of those values over time. Monitoring can be implemented to measure changes in condition over time and therefore can serve as an early warning of undesirable changes in the condition of a value. This perspective answers the question ***“What condition is the value in?”*** and is an indication of potential threats to the value and ultimately to the ecological integrity of the protected area(s). These elements are addressed in the guideline, *Determining Planning and Management Priorities in the Context of Ecological Integrity: A Practical Approach for Planning Teams*.

Management direction will describe monitoring needs for consideration as techniques, skills and resources allow. ***“How do we establish monitoring priorities?”*** There are five general steps associated with setting priorities for monitoring effectiveness of management direction (Table 4.1). The vision, site objectives and actions for the protected area provide a direct link to the purpose and objectives of the PPCRA.

Table 4.1 Steps for Setting Priorities for Monitoring Effectiveness of Management Direction

Step 1	Establish a clear understanding of the direction provided by the purpose, vision, objectives and actions of the protected area; and what is required to determine their future achievement.
Step 2	Determine the various values that are associated with the protected area and the condition of those values.
Step 3	Identify what pressures exist (and the underlying causes) that are adversely affecting the protected area(s) as a whole and/or affecting the values within the protected area(s).
Step 4	Assess the level of risk posed by the pressures on the identified values to determine the priorities.
Step 5	Identify monitoring methods and indicators.

The guideline, *Determining Planning and Management Priorities in the Context of Ecological Integrity: A Practical Approach for Planning Teams*, provides more detail on the steps listed in Table 4.1. The implementation of these steps is recorded in the information repository (PAPIR). Monitoring priorities should be integrated with other MNR programs, wherever practicable.

4.2.2 Monitoring

Monitoring is the collection of data and information in a consistent manner over time. Consistency is important because it allows comparison of results over time and from place to place. Generally, the purpose of monitoring is to gather data and information to address specific questions that stem from specific information needs related to management. It is necessary to design monitoring to address specific questions. Otherwise, the purpose of the monitoring is unclear, the results have limited usefulness, and human and financial resources are not used to full advantage.

Data collection methods can range from very simple to very complex. Finding where a particular monitoring effort falls along that scale is determined by:

- The question being asked.
- What is known about the resource to be monitored.
- The pressures on that resource.
- The type of monitoring that is required.

As the complexity of monitoring and data collection increases, the cost and the need for additional specialized assistance (e.g., for statistical design and analysis) also increases. Regardless of the monitoring methods used, it is important that MNR staff and others collect the data in a systematic manner.

Refer to the Monitoring Guideline for more information on data sources, types of monitoring, and collection methods (e.g., socio-economic surveys, SOPAR, etc.). Data collected is stored in the information repository (PAPIR) or other databases.

5.0 ADJUSTING MANAGEMENT DIRECTION

Management direction is prepared with a 20-year window or perspective in mind to provide site-specific policies for each protected area. The appropriate manager monitors the implementation of management direction on an ongoing basis and at 10-year intervals (examination) in an effort to keep it current and relevant. Requests for a re-write or specific changes may also arise from an Aboriginal community, the public or stakeholders.

First considered in this chapter are administrative updates and amendments (including secondary plans), followed by the examination of management direction.

This chapter focuses on the aspects of maintaining management direction so that it is current and relevant, including:

- Administrative updates, amendments (including secondary plans) and re-writes.
- Examinations.

5.1 Administrative Updates and Amendments

An approved administrative update or amendment could result in an addition, deletion or other change to an approved management direction.

5.1.1 Administrative Updates

An administrative update is a change MNR considers a minimal or modest change to an existing management direction that MNR considers to be usually characterized by one or more of the following categories:

- Is required to keep management direction current and relevant while not changing the majority of the existing management direction.
- Makes no substantive policy change to the existing management direction.
- Deals with matters that are not environmentally significant.
- Corrects or clarifies the intent of a policy statement.
- Addresses some error or omission.
- Follows through on a prior decision (e.g., through legislation, Crown land use planning) made following external involvement.
- Anticipated to have little or no Aboriginal, public or stakeholder interest.

A terms of reference is not required when processing administrative updates. The responsible MNR district/zone manager may defer administrative updates and incorporate them with future amendments or re-writes of management direction.

Administrative updates do not require Aboriginal, public and stakeholder involvement or notification. However, it may be prudent for MNR staff to advise potentially interested parties, by appropriate means, when contemplating administrative updates.

Approved administrative updates are added to the Protected Area Planning Information Repository (PAPIR) and would be inserted or attached to printed copies of the existing management direction. Administrative updates will also be inserted into the electronic master version of the management direction and placed on the MNR website.

An administrative update to existing management direction may trigger an administrative Crown land use amendment.

5.1.2 Amendments and Secondary Plans

Amendments to existing management direction may be required to address changes in policy originating from internal proposals or to respond to valid external requests for a policy change to keep the management direction current and relevant. In addition, an elaboration or clarification of policy may be warranted to address complex topics (e.g., management of fire, wildlife, fisheries, ecosystems, etc.) and this can be addressed in a secondary plan, which will constitute an amendment to management direction. These require Aboriginal, stakeholder and public involvement activities. A terms of reference is not mandatory but should be considered when undertaking complex amendments (e.g., preparation of secondary plans).

Amendments can address single or multiple proposals for changes. Such proposed changes can result in a limited or substantive alteration to portions of an existing management direction. Response to a proposed amendment can range from causing little or no public and/or agency concern to significant concern with a public or Aboriginal group and/or other agencies. This range of response may be due to public and/or Aboriginal concern that there is potential for limited to substantial impacts and/or limited to substantial negative environmental and/or socio-economic effects. Proposed amendments may include adding new facilities that were not anticipated in the existing management direction or dealing with proposed changes to boundaries and explaining the rationale for a boundary regulation change (except for lands specifically acquired or donated for the purpose of being added to an existing protected area).

For protected areas, secondary plans are intended to be prepared generally for complex topics, where approved management direction does not provide sufficient policy direction to address a certain topic(s). All the requirements for an amendment to an existing management direction would similarly be applied to a secondary plan, including associated Aboriginal, public and stakeholder involvement opportunities and Environmental Registry policy postings. A secondary plan can be prepared subsidiary to an existing management direction for one or more grouped protected areas, where deemed appropriate by MNR.

In some cases, an approved management direction may defer direction and prescribe the preparation of a secondary plan. Alternatively, the need for a secondary plan might arise in response to an unforeseen circumstance, or as a result of an examination of management direction. The process of preparing a secondary plan can be coordinated with the Class EA-PPCR project evaluation. Refer to the Secondary Plan Directive for additional guidance.

Any person can initiate a proposal for an amendment by submitting it to the appropriate level of authority (provincial parks - zone manager; conservation reserves - district manager.) In this way, the proponent makes a case in writing for an amendment identifying details as to their reason(s) for the proposed change and rationale explaining the benefits of the proposed amendment. If MNR deems the proposal appropriate and with merit, this triggers the planning process (see Figure 5.1). MNR will forward the proponent a written notice of decision (including rationale) where it disallowed or deferred the proposal.

When MNR deems a proposed amendment to management direction to be an administrative update, external involvement is not required.

The process of amending management statements will include at least one opportunity for public involvement. The process of amending management plans will include at least two opportunities for public involvement. Additional opportunities for public involvement may be warranted.

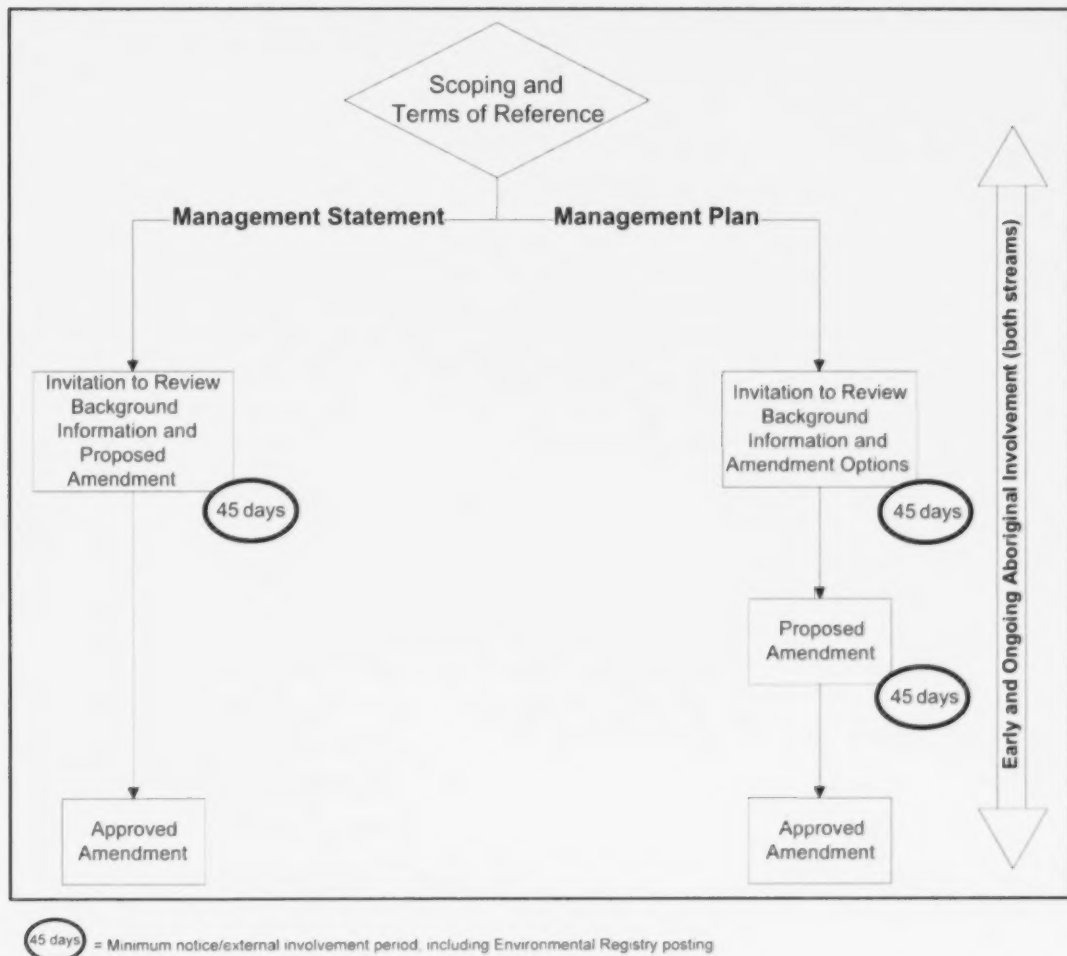
Proposals for amendments should be evaluated to determine:

- Conformity with legislation and provincial policy and the overall vision, purpose and objectives for the protected area.
- If there is an urgent need or if it can be deferred (e.g., until the 10-year examination of management direction).
- Anticipated degree of Aboriginal, public or stakeholder interest or support.

- The extent to which similar issues may have been considered and deferred either in the initial development of the management direction or through a recent request.
- The ministry's capacity to address the proposal (e.g., finances, staffing and information).

The MNR should not amend an existing management statement, particularly older (grandparented) statements of conservation interest or interim management statements for which prior consultation did not occur, to allow a substantial or complex undertaking(s). In this situation, the MNR should instead prepare a new management plan to address the substantial or complex proposal(s). Alternatively, a minimum of a Category C evaluation and consultation process will be undertaken and include an amendment to the management statement or plan.

Figure 5.1 Planning Process for Amendments to Existing Management Direction



An amendment to management direction that results in a change to policy would trigger a Crown land use amendment (e.g., new boundary, phase out of hunting from an area previously allowing hunting, change in park classification or protected area designation). Requirements for management direction

amendments can be coordinated to address Crown land use amendment and Class EA-PPCR requirements, as appropriate.

Aboriginal Involvement:

Following a decision to initiate an amendment, the MNR planning team should work with Aboriginal communities with interests in the protected area to develop an approach for involvement. The steps followed should be similar to those described in the terms of reference to scope out the involvement process to discuss the amendment. The involvement approach should be tailored to each Aboriginal community and followed throughout the amendment process. Aboriginal communities should be made aware of opportunities to comment along with the public as well.

Public and Stakeholder Involvement:

Public and stakeholder involvement will be implemented in accordance with the terms of reference (optional) and the public and stakeholder involvement approach specifically developed for the amendment process. The involvement opportunities identified in Figure 5.1 for a proposed amendment to a management statement (one) or plan (two) will include, as a minimum:

- Sending notification (e.g., mailed or e-mailed notices) of released documents to those on the mandatory contact list.
- Posting Environmental Registry policy proposal notice (with an invitation to comment open for 45 days).
- Placing proposed amendment on the MNR website.
- Putting up on-site notices (where appropriate).

In some cases, new proposals or issues may arise and it may be appropriate to undertake further involvement. This additional involvement may be open to everyone or be scoped to those who have a particular interest in, or are affected by a particular planning topic.

Following external involvement, the proposed amendment will be revised, as MNR considers appropriate, to take into consideration public response to the proposal. Significant issues should be addressed prior to approval. A recommendation for amendment approval will occur following incorporation of any revisions.

Notice of Approved Amendment:

At a minimum, notification of an approved amendment will include:

- Notification (e.g., mailed or e-mailed notices) of approved documents to those on the mandatory contact list.
- Posting of Environmental Registry policy decision notice.
- Placing approved amendment on the MNR website.

For further guidance, refer to the Aboriginal Involvement Guideline and Public and Stakeholder Involvement Guideline.

Approved amendments are added to the information repository (PAPIR) and would be inserted or attached to printed copies of the original management direction. Amendments will also be inserted into the electronic master version of the management direction and placed on the MNR website.

5.2 Examinations

In keeping with the PPCRA, starting on September 4, 2012, the ministry shall annually examine, in an order determined by the ministry, management direction documents that have been in place for 10 years or more and shall determine the need for amendments to, or re-writes of the documents.

The examination will entail:

- A review of the original information repository (PAPIR) and products.
- A determination as to the scope of the needs, which may range from a confirmation that the existing management direction is still appropriate (with a 20-year planning horizon in mind), to an administrative update(s) or amendment(s), or to a preparation of a new management direction.
- A review of any outcome of monitoring activities associated with determining effectiveness in achieving the vision and site objectives (adaptive management approach).
- Consideration of whether the management direction policies and direction continues to support the maintenance of ecological integrity.
- A review of the overall contents of an approved management direction (both text and maps).

5.2.1 Possible Outcomes of the Examination

There are four possible outcomes resulting from the examination of existing management direction:

1. **Status quo** – the existing management direction is still achievable relevant and no changes are required for continuing management (do nothing).
2. **Administrative update(s)** – there is a need for minimal changes to make existing management direction achievable and relevant until the next examination.
3. **Amendment(s)** – a number of changes are required to make existing management direction achievable and relevant until the next examination.
4. **Re-write** – the current management direction is no longer achievable or relevant and/or significant changes are required to proceed with management (i.e., prepare new management direction).

If the examination results by the MNR indicate that no changes are required, then the planning process is complete. With the exception of administrative updates, all other outcomes of the examination of the management direction require Aboriginal, public and stakeholder involvement. For amendments, the focus will be on the specific reason(s) for the proposed changes. A decision to re-write the management direction will bring about the full implementation of planning process, including Aboriginal, public and stakeholder involvement (per Chapter 2).

Support for the process of examining the current management direction arises from a review of current legislation and policy, an examination of social, economic and environmental factors, Aboriginal considerations and information found within PAPIR. Refer to the Adjusting Management Direction Guideline for a tool and criteria to assist in determining the outcome of an examination of current management direction for a protected area or group of protected areas.

An unscheduled examination of an approved management direction may occur at any time at the discretion of the MNR. Circumstances may arise which make it untenable to wait for the 10-year cycle to close. Triggering of an unscheduled examination may occur when the site objectives that direct protected area management activities become unattainable, the management policies become substantially inappropriate, or there new substantial development or other changes are proposed.

MNR will post the results of examinations on the Environmental Registry or make the results available for public information by other appropriate means (e.g., posting on the MNR website). The outcomes will feed back into the appropriate MNR five-year protected area planning schedule.

5.2.2 Examination Records

The planner retains a record of the examination process on the information repository (PAPIR) for the life of the management direction. The Adjusting Management Direction Guideline includes a tool for documenting the results of the examination process.

5.2.3 Term of Management Direction

The term of an approved management direction is the 20-year period commencing from the date of approval of the document. As a result of the examination process, the responsible MNR district/zone manager may extend the term of a management direction for 10 years.

6.0 PLANNING MANUAL ADMINISTRATION

6.1 Monitoring Implementation of the Manual

The purpose of monitoring the implementation of this planning manual is to determine whether it is fulfilling its stated purpose and to identify opportunities for improvement that would enhance its effectiveness.

To assist in monitoring progress and experience arising from the implementation of this manual, MNR will:

- Retain copies of completed planning file information and approved management direction at the protected area (where offices exists), and at the relevant district or zone office.
- Retain copies of approved management direction at the Planning and Research Section, Ontario Parks.
- Provide copies of approved management direction and published documents related to current planning projects on the MNR website.
- Maintain the *Crown Land Use Policy Atlas*, which includes information on approved land use direction, management direction, amendments and re-writes.
- Include appropriate information related to protected areas planning in the *MNR State of the Protected Areas Report*.

This chapter focuses on implementation and maintenance of the *Protected Areas Planning Manual*. It includes:

- Provisions for monitoring.
- Practical steps for revising the manual, in terms of minor and major revisions.

6.2 Revisions to the Planning Manual

The planning manual will be revised, improved, and updated based on experiences in using the manual and/or as new information becomes available. MNR will monitor the provision of information to and from MNR, and the effectiveness and ease of use of the manual to determine if improvements or revisions to the manual are required.

As MNR determines it is required, the ministry may revise the planning manual from time to time. MNR will append minor and major revisions as an addendum to this manual. Alternatively, MNR may consolidate revisions directly into the text. MNR will maintain a master electronic copy of the manual, and a consolidated version on the MNR website. Internal and external clients will be able to download addendums to the manual.

A number of supplementary tools and guidelines are listed in the planning manual (see Chapter 9). Updates and revisions to these supporting technical materials will sustain the use of modern and efficient processes and approaches in protected areas planning. The ministry will manage these materials independently of the planning manual and they may be changed, created or deleted at MNR's discretion, without external involvement.

6.2.1 Minor Revisions

In general, a minor revision to the planning manual may entail:

- Making administrative or housekeeping changes.
- Applying modifications required to keep the manual current and relevant, while not changing the majority of the existing direction and requirements.
- Correcting or clarifying the intent of a statement or requirement.
- Addressing errors or omissions.

- Adhering to an amendment to the PPCRA, EBR or other pertinent legislation.
- Complying with changes in MNR's strategic direction.

MNR may approve minor planning manual revisions without external involvement.

6.2.2 Major Revisions

Major revisions would include changes that MNR considers may have significant impact on the implementation of the manual. They could include changes to the following:

- Mandatory public notice procedures or timelines.
- Essential elements of the planning process.

Aboriginal, Public and Stakeholder Involvement:

Major revisions to the manual may result through the involvement of Aboriginal communities, the public and stakeholders.

There will be an external involvement opportunity provided in association with proposed revisions to the planning manual, with an invitation to comment for 45 days (minimum).

MNR will implement external involvement in accordance with an involvement approach specifically developed for the revision. This will include, as a minimum:

- Mailed notice to Aboriginal communities.
- Mailed notice to select stakeholders (i.e., provincial/national level non-government organizations and agencies).
- Environmental Registry policy proposal notice.
- Notice and proposal placed on the MNR website.

MNR will consider any comments received prior to approving a major revision to the planning manual. For approved revisions, MNR will post a policy decision notice on the Environmental Registry and place a notice on the MNR website.

Approved revisions and amendments (minor or major) will be attached to printed copies of the original planning manual. Revisions and amendments will also be inserted into the electronic master version of the planning manual and placed on the MNR website.

6.3 Transition Provisions

This manual replaces the *Ontario Provincial Park Management Planning Manual* (1994) and other prior processes used for conservation reserves planning. However, on the date when the approval for the *Ontario Protected Areas Planning Manual* comes into effect, planning and implementation of management statements or plans will be underway at various stages using the older planning manuals.

The following provisions will ensure a smooth transition between previous requirements and the new manual requirements:

- Where a planning project is underway, that process may continue if the planning team has already issued a public notice for that process on the date when this manual approval takes effect. The planning team should apply the requirements of this manual to the rest of the process wherever practicable, but

Approved management directions include management plans and interim management statements for provincial parks, and statements of conservation interest and resource management plans for conservation reserves that existed on September 4, 2007.
(Source: PPCRA)

- applying the manual will not be a formal requirement.
- If the planning team has not issued a public notice for a planning project by the date when this manual takes effect, then this manual will apply.
 - Processes to amend management direction will follow the provisions in this manual (as amended from time to time).

7.0 GLOSSARY OF TERMS

The glossary defines words and terms used throughout the *Ontario Protected Areas Planning Manual*. While MNR has made every effort to conform to technical, dictionary and common usage, note that these definitions reflect usage of the words and terms in the context of this manual.

@PAR: Protected Areas Registry

Class EA-PPCR: A Class Environmental Assessment for Provincial Parks and Conservation Reserves

Class EA: Class Environmental Assessment

EA: Environmental Assessment

EBR: *Environmental Bill of Rights*, 1993

ESA: *Endangered Species Act*, 2007

FIPPA: *Freedom of Information and Protection of Privacy Act*

MNR: Ministry of Natural Resources

NHIC: Natural Heritage Information Centre

NRVIS: Natural Resources and Values Information System

ODMS: Ontario Document Management System

PAPIR: Protected Area Planning Information Repository

PPCRA: *Provincial Parks and Conservation Reserves Act*, 2006

SEV: Statement of Environmental Values

NOTE: *Underlined words within definitions are also defined in the glossary.*

Abiotic: Describing the non-living components of an ecosystem.

Aboriginal Peoples: The *Constitution Act*, 1982 states that "Aboriginal peoples of Canada" includes the Indian, Inuit and Métis peoples of Canada.

Aboriginal Site Values: Locations, features on the landscape, and associated activities that are significant to Aboriginal peoples (e.g., community meeting areas, spiritual sites, burial sites, etc.).

Adaptive Management: A process for continually improving management policies and practices by learning from the outcomes of their application.

Addendum: An addendum is a supplemental addition to a document. It may correct errors, explain inconsistencies or otherwise detail or update the information found in the main work, especially if any such problems were detected too late to correct the main work.

Amendment: An amendment to an existing management direction involves proposed changes to make a management statement or management plan achievable and relevant. Amendments must meet the consultation requirements of the PPCRA. (see also "Secondary Plan").

Anthropogenic: Substances, processes, etc. resulting from human activity.

Background Information File: A file prepared to support the various components of the planning process. The background information file is required for all protected areas in the province of Ontario and is located within PAPIR. The background information file is a concise file that represents the most current known information about a protected area or grouping of protected areas. The file is intended to assist Aboriginal, public and stakeholder planning participants and is available for use and review. A background information file can include but not limited to information on natural values, Aboriginal site values, social and economic values and protected area pressures.

Background Information Document: A document prepared to provide an in depth understanding of a protected area. A background information document is based on information available from the background information file. The document is intended to assist Aboriginal, public and stakeholder planning participants and is available for use and review.

Biodiversity: Biological diversity or biodiversity refers to the variety of life, as expressed through genes, species and ecosystems that is shaped by ecological and evolutionary processes.

Biotic: Describing the living components of an ecosystem.

Class Environmental Assessment: A class environmental assessment (Class EA) is an efficient and effective approach that is applied to a group or "class" of projects that have common attributes, qualities or characteristics; as well as generally predictable impacts. The *Class Environmental Assessment for Provincial Parks and Conservation Reserves* (OMNR 2005a) is an approved Class EA under the *Environmental Assessment Act*.

Classification: Park classification organizes provincial parks into broad categories, each of which has particular purposes and characteristics as well as distinctive planning, management and visitor services policies. Park classification defines an individual park's role in providing opportunities for environmental protection, recreation, heritage appreciation and/or tourism. Each park shares with others in its class particular characteristics, which help determine its specific function. Classification establishes a management framework for individual parks within the provincial protected areas system.

Conservation Reserve: A protected area regulated under the PPCRA. Conservation reserves protect natural heritage values and prohibit industrial uses while allowing a broader range of traditional activities to continue.

Crown Land: Refers to all lands, including land under water, managed by MNR. This terminology has been used rather than "public lands", because many other government agencies manage lands that can generically be described as public lands. The broad definition of Crown land that is used in the planning manual includes acquired lands as well as ungranted land (land that has never been sold or transferred by the Ontario government).

Crown Land Use Policy Atlas: CLUPA is the official source of area-specific land use policies for Crown lands, and associated mapping of the land use areas, in much of Ontario. The Atlas is available on the internet at: <http://crownlanduseatlas.mnr.gov.on.ca/>.

Custodial Management: Management aimed at minimizing external influences and pressures on the protected area ecosystem. Active management is not a priority.

Earth Science: The physical elements of the natural landscape created by geologic processes and

distinguished by their composition, structure and internal layering or stratigraphy and by their relief, contour and spatial distribution or topography. Those earth science features distinguished by stratigraphy include rock strata and fossil assemblages, while those distinguished by topography include all varieties of land and submarine forms.

Ecological Integrity: Refers to a condition in which biotic and abiotic components of ecosystems and the composition and abundance of native species and biological communities are characteristic of their natural regions and rates of change and ecosystem processes are unimpeded. Ecological integrity includes, but is not limited to the following:

- Healthy and viable populations of native species, including species at risk, and maintenance of the habitat on which the species depend.
- Levels of air and water quality consistent with protection of biodiversity and recreational enjoyment.

Ecosystem: A multi-scale unit of interacting organisms and the non-living resources (e.g., water, soil) on which they depend, as a functional and integrated whole.

Environment: The *Environmental Assessment Act* defines environment to mean:

- (a) Air, land or water.
- (b) Plant and animal life, including human life.
- (c) The social, economic and cultural conditions that influence the life of humans or a community.
- (d) Any building, structure, machine or other device or thing made by humans.
- (e) Any solid, liquid, gas, odour, heat, sound, vibration or radiation resulting directly or indirectly from human activities.
- (f) Any part or combination of the foregoing and the interrelationships between any two or more of them.

Environmental Assessment: Environmental assessment is a study, which assesses the potential environmental effects (positive or negative) of an individual proposal. Key components of an environmental assessment include consultation with government agencies and the public; consideration and evaluation of alternatives; and, the management of potential environmental effects. Conducting an environmental assessment promotes good environmental planning before decisions are made about proceeding with a proposal.

Environmental Registry: An Internet site established by the *Environmental Bill of Rights* (EBR) to provide information about the environment to the public. This information includes: the text of the EBR; general EBR information; each prescribed ministries' Statement of Environmental Values; summaries of proposed acts, regulations, policies and instruments; notices of appeals of instruments and appeal decisions; notices of court actions and final results; and application forms for reviews and investigations.

Environmental Study Report: The report that formally documents a project evaluation process carried out for a Category C project under *A Class Environmental Assessment for Provincial Parks and Conservation Reserves*.

Examination: Under the PPCRA, this term refers to a thorough examination of management direction to determine whether the term of a management statement or management plan can be extended, with or without administrative updates or amendments; or if a full re-write is required given the extent of changes required.

Footprint: The area occupied by a project.

Function: In regards to natural features and functions, means the natural processes, products or services that species and non-living environments provide or perform within or between ecosystems and landscapes.

Geographic Information System: A geographic information system (GIS), captures, stores, analyses, manages and presents data that refers to, or is linked to, a location on earth. The term describes any information system that integrates, stores, edits, analyses, shares, and displays geographic information. GIS applications are tools that allow users to create interactive queries (user created searches), analyze spatial information, edit data, maps, and present the results of all these operations.

Grouping: A planning approach applied to achieve planning efficiency (e.g., one coordinated management planning process for two or more protected areas). This may include provincial parks and/or conservation reserves and result in the production of a single or multiple management direction documents.

Interim Management Statement: Former term for a provincial park management statement approved prior to September 2007.

Inventory: The determination of the distribution, abundance and characteristics of a natural resource such as wild life species and habitats, cultural resources and recreational resources. In the context of an ecosystem approach, inventory permits managers to measure composition and structure.

Land Information Ontario: LIO is a provincial initiative that supports the province-wide sharing of geographic data. As part of MNR, LIO provides centralized access to data through a number of tools and services (i.e., LIO warehouse, data exchange, data directory and internet mapping).

Land Use Direction: A MNR land use direction is a document (including an electronic source) that outlines approved land use policies for an area of public land administered by the Ministry of Natural Resources. MNR currently prepares very few land use plans, because area-specific land use policies are primarily documented and maintained in CLUPA.

Life Science: Living natural resources, including plants, animals, and micro-organisms, plus the environmental resources to which species contribute.

Maintenance: Generally, the regular, routine actions, taken to retard the natural deterioration of a resource (or fixture, chattel and/or equipment). These actions are intended to keep the resource from premature loss due to failure, decline, wear or change attributable to normal use or the effect of the natural environment.

Maintenance (of Ecosystems): (see "Ecological Integrity").

Management: Keeping or modifying the natural form, processes and attributes of land and water to some desired condition or state as defined by humans. Management can include maintenance, preservation, protection, enhancement, restoration or any combination thereof.

Management Direction: Includes a management statement or a management plan for a provincial park(s) and/or a conservation reserve(s) (also, grandparented statements of conservation interest for conservation reserves or interim management statements for provincial parks). Management directions provide policy for the management of protected areas.

Management Proposals: This often includes proposing alternative approaches to manage protected area resources, infrastructure and operations and thus to get feedback on proposed alternatives. The planning team may develop any number of proposed alternatives, which attempt to satisfy the divergent interests and challenges to varying degrees.

Management Plan: A document that provides a policy and resource management framework (management direction) that addresses substantial and complex issues or proposals or both for substantial capital infrastructure or resource management projects for one or more provincial parks or conservation reserves or for a combination of them.

Management Statement: A document that provides a policy and resource management framework (management direction) that addresses a limited number of non-complex issues or proposals or both for limited capital infrastructure or resource management projects for one or more provincial parks or conservation reserves or for a combination of them.

Mandatory Contact List: A listing of mandatory (and discretionary) contacts regarding the distribution (mail or e-mail) of notices or documentation and to meet public, stakeholder and Aboriginal involvement requirements associated with protected area planning processes. MNR compiles and updates the list as required.

Mitigation: Avoiding, eliminating, offsetting or reducing to an acceptable level the potential effects of a project. It can also include rehabilitation, restoration, or enhancement where feasible. Mitigation is the means by which projects can be modified to minimize or eliminate potential negative effects. This can include off-site measures that achieve the same objective.

Monitoring: The collection of data and information in a consistent manner over time.

Natural Heritage Information Centre: As part of MNR, NHIC's mission is to acquire, maintain, update, and make available data on the province's rare species, vegetation communities, and natural areas. NHIC maintains a permanent and dynamic atlas and data bank on the character, distribution and conservation status of natural areas, critical flora and fauna, communities and special features in Ontario.

Naturalness: Being natural or near natural in character and relatively undisturbed, or else in the process of recovery from human disturbance.

Natural Resources and Values Information System: The Ontario government's Geographical Information System for managing geographic information (both tabular and spatial). NRVIS contains an evolving set of standardized geo-referenced databases that are intended to address a broad range of business requirements.

Natural Heritage: Natural heritage is all living organisms, natural areas and ecological communities that we inherit and leave to future generations.

Natural Resource: Anything that is valued or used directly by humans and produced or derived directly from natural sources. A renewable resource can renew itself (or be renewed). A non-renewable resource is one whose consumption eventually results in its depletion.

Natural Values: Specific natural attributes or features within a protected area that may require additional or special consideration during planning and management.

Non-government Organization: A NGO is a legally constituted organization created by private persons or organizations with no participation or representation of any government.

Objectives: As set out in the PPCRA, objectives in establishing and managing provincial parks and conservation reserves (see also "Site Objectives").

Ontario Document Management System: The ODMS is a web-based tool for enhancing the public's and staff access to government-held documents and information.

Pressure: Any natural disturbance or human (anthropogenic) activity or facility (including associated activities) that has a negative or positive impact on a value.

Project Evaluation: In the context of the Class EA-PPCR, project evaluations pertain to the technical evaluation required as part of each project evaluation and consultation process for Category B and Category C projects.

Proposed: In MNR's land use planning documents, the use of the term "proposed" in conjunction with land use designations refers to areas where specific land use designation proposals have been put forward for public discussion (see also "Recommended").

Protected Area: For the purposes of the manual, "protected area" refers to a provincial park or conservation reserve, either proposed, recommended through an approved land use direction (e.g., *Ontario's Living Legacy Land Use Strategy* or MNR district land use guideline), or existing in regulation.

Protected Area Planning Information Repository: PAPIR is an in-house repository for all planning related information for every protected area in the province of Ontario. It functions as an up-to-date resource for MNR staff, including the eventual historical archive for protected areas. PAPIR is not an automated way to store information; it relies on users to store information.

Protected Areas Registry: This is an in-house database (@PAR) which provides MNR staff with the ability to create and maintain protected areas, track projects and management directions for these protected areas, and provides various reports, which summarize the current protected area information.

Provincial Park: Protected area regulated under the PPCRA.

Published Document: Documents in any form, including print and electronic (e.g. PDF), intended to be distributed to the general public.

Recommended: In MNR's approved land use planning documents, the use of the term "recommended" in conjunction with land use designations (e.g., "recommended" conservation reserve or provincial park) refers to areas where a land use decision has been made that an area should be placed into regulation under a specific piece of legislation, but the regulation has not yet been approved. When the area is regulated the "recommended" label is automatically dropped (see also "Proposed").

Regulated: In MNR's land use planning, "regulated" usually refers to the application of land use designations to specific areas (e.g., "regulated" conservation reserve or provincial park) through the approval by the Lieutenant Governor-in-Council of a regulation under a piece of legislation (e.g., PPCRA).

Research: Any investigations or studies of natural, cultural, social, economic, management, or other features or characteristics of protected areas.

Resource: Generally, a value, feature, attribute, or physical component; an available renewable or non-renewable supply that can be drawn on when needed, be it animal, vegetable, mineral, etc.

Resource Management Plan: Former term for a conservation reserve management plan approved prior to September 2007.

Re-write: Following an examination of existing management direction, the extent and complexity of proposed changes and/or external interest may require a complete re-write of the management direction. This involves the preparation of a new management statement or management plan.

Secondary Plan: Plans that may be prepared, generally for complex topics, where approved management direction does not provide sufficient policy direction to address a certain topic(s). Secondary plans are treated as amendments to management direction.

Site Objectives: Protected area objectives are concise, measurable statements of the desired future condition for a protected area, resource (value) or resource use with is attainable through management action. Site-specific objectives are consistent with the objectives of the PPCRA (see also "Objectives").

Social and Economic Values: Social values include use and non-use benefits associated with

protected areas (e.g., a beach that supports recreation) and cultural heritage sites. Economic values are the economic benefits associated with the protected area.

Species at Risk: The categories of species listed by MNR on its Index List of Vulnerable, Threatened, Endangered, Extirpated or Extinct Species of Ontario, as amended from time to time.

Stakeholder: Any persons whose right to use, acquire or enjoy property is or may be affected by any action taken under an approved protected area management direction, or whose right to use or enjoy a protected area under a management direction may be infringed upon by an action or a failure to act under the management direction.

Statement of Conservation Interest: A type of management direction for conservation reserves approved prior to September 2007.

Statement of Environmental Values: A SEV, required by the EBR, that explains how the purposes of the EBR are to be applied when environmentally significant decisions are made in the ministry and how consideration of the purposes of the EBR should be integrated with other considerations, including social, economic and scientific considerations, that are part of decision-making in the ministry.

State of Protected Areas Reporting: SOPAR reporting shall provide, but shall not be limited to, a broad assessment of the extent to which the objectives of provincial parks and conservation reserves, as set out in the PPCRA, are being achieved. This includes ecological and socio-economic conditions and benefits, the degree of ecological representation, number and area of provincial parks and conservation reserves, known threats to ecological integrity of provincial parks and conservation reserves and their ecological health and socio-economic benefits.

Status Quo Management: Maintaining the same level or state of management of a protected area, as opposed to a large or radical change in management.

Sustainability: A characteristic of a process or state that can be maintained indefinitely.

Terms of Reference: A guide for the planning process, which a planning team follows during the preparation of management direction. It identifies the task(s); describes who will perform the task and in what capacity; explains how and when the work will be done; and gains approval to proceed.

Traditional Territory: Area in which an Aboriginal community identifies as land that they or their ancestors traditionally used.

Treaty Rights: The specific rights of the Aboriginal peoples embodied in the treaties they entered into with a Crown government, initially Britain and after confederation, Canada. They may address matters such as the creation of reserves and the rights of Aboriginal communities to hunt and fish. Existing treaty rights are recognized and affirmed by Section 35 (1) of the *Constitution Act*, 1982.

Value: A specific attribute or feature (Aboriginal, cultural, ecological or recreational) within a protected area that may require additional/special consideration during the planning process and subsequent management. There are two types of values, *tangible* and *intangible*, and values can occur at a variety of scales. A *tangible value* is any discrete attribute or feature within a protected area that can be physically described and defined on the ground as a point, line or polygon (e.g., an element occurrence of a rare species, a unique geological feature, a cultural feature or a site of interest to an Aboriginal community). An *intangible value* is a conceptual perspective that can be described but cannot be readily defined on the ground (e.g., a scenic vista, a backcountry or wilderness experience, etc.).

Zoning: A tool used to delineate areas within a protected area, often containing certain values, where a discrete set of policies may be applied to enable the achievement of site objectives.

8.0 LIST OF REFERENCES

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9.0 SUPPLEMENTARY TOOLS AND GUIDELINES

The supplementary technical tools and guidelines listed below will assist planning teams through all aspects of protected area planning. Tools consist of a variety of in-house templates, checksheets/checklists, and forms. Guidelines generally refer to technical standards and administrative directives.

In general, the tools and guidelines will provide technical guidance to MNR staff and are therefore not normally subject to formal review.

The individual tools and guidelines may be periodically updated. This is not a comprehensive list and many were under development at the time of writing this manual: refer to the MNR/Ontario Parks website at <http://www.ontarioparks.com/english/plan-res.html> for the most current list of planning tools and guidelines.

Involvement

- Aboriginal Involvement Guideline
- Public and Stakeholder Involvement Guideline
- Issue Resolution Guideline

Scoping and Terms of Reference

- Scoping and Terms of Reference Guideline
- Five-year Protected Area Planning Schedule Guideline

Background Information

- Determining Planning and Management Priorities in the Context of Ecological Integrity: A Practical Approach for Planning Teams
- Background Information Guideline
- Protected Areas Planning Information Repository Guideline

Management Proposals

- Management Proposals Guideline
- Protected Areas Zoning Guideline (e.g., A Framework for Zoning Conservation Reserves or Provincial Parks)
- Protected Areas Compatibility Test

Management Direction

- Management Direction Template

Coordinating Processes

- Coordination of Protected Areas Planning Processes Bulletin

Monitoring Effectiveness

- Monitoring Guideline

Adjusting Management Direction

- Adjusting Management Direction Guideline
- Examination of Management Direction Guideline

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